

# Oracle® Cloud

## Reference for Fusion CX Analytics



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# Preface

## Topics:

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

## Audience

This document is intended for Oracle Fusion Data Intelligence 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>.

### Access to Oracle Support

Oracle customer access to and use of Oracle support services will be pursuant to the terms and conditions specified in their Oracle order for the applicable services.

## Related Documentation

These related Oracle resources provide more information.

- Oracle Cloud <http://cloud.oracle.com>
- Administering Oracle Fusion Data Intelligence
- Using Oracle Fusion Data Intelligence

- 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

Oracle Fusion CX Analytics is a prebuilt, cloud native analytics application that provides Sales, Marketing, Service, Subscription and CPQ line-of-business users with ready-to-use insights to improve decision-making.

It helps break down the data silos between sales, marketing, and service by enabling a customer-centric view of all revenue generation activities. This application helps achieve full revenue potential by combining sales, marketing and service data in a unified analytic solution. Oracle Fusion CX Analytics comes with prebuilt data pipelines to Oracle CX Cloud applications, which helps reduce complexity and ensure a consistent, accurate view of business-critical data, in familiar business terms for end users. Without having to code, the customer experience teams can enrich their analytics using embedded machine learning (ML) and additional data from other sources beyond Oracle Fusion Cloud Applications. Oracle Fusion CX Analytics supports an analytics-driven business culture with a platform that addresses the needs of the entire analytics workflow. Self-service data preparation capabilities permit business users across departments to access, combine and leverage all relevant data. See [Oracle Fusion CX Analytics](#).

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 business metrics, and prebuilt dashboards.

### Features Available for Preview

Preview features enable functional administrators to switch functionality on and off. This way, your organization can evaluate and learn how to use new features before they roll out by default.

To enable the preview features, see [Make Preview Features Available](#).

#### Functional Areas

| Feature                                     | Description                                                                                                                                                 |
|---------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Subscription Historical Trends              | Enables Subscription Management Snapshot functional area offering in Oracle Fusion CX Analytics.                                                            |
| CX Resource HCM Worker Analytics            | Enables cross pillar analytics between Fusion CX Analytics and Fusion HCM Analytics applications by helping join Resource (CX) and Worker dimensions (HCM). |
| Enable Opportunity Date Change Tracker      | Tracks change in Expected Close Date and Revenue of an Opportunity.                                                                                         |
| Marketing Campaign Contact Detail Analytics | Enables Eloqua Campaign Activity reporting at Contact and Asset grain.                                                                                      |

| Feature               | Description                                                       |
|-----------------------|-------------------------------------------------------------------|
| SF CRM Pipeline       | Enables Salesforce reporting for pipeline, leads, and activities. |
| SF Campaign Analytics | Enables Salesforce reporting for campaigns.                       |

### Pipeline Features

| Feature                                             | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|-----------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Enable Salesforce Advanced Currency Management      | <p>This feature enables Salesforce advanced currency management. The data is available for all related attributes in the Sales subject area. If you've enabled Salesforce advanced currency management, enable this pipeline feature\.</p> <p>It makes the converted rate for the Opportunity per the dated currency conversion rate available for reporting.</p> <ul style="list-style-type: none"> <li>• <b>On</b>– Display the <b>Enable Salesforce Advanced Currency Management</b> detail in the Pipeline Parameters section on the Pipeline Settings page.</li> <li>• <b>Off</b> – Hide the <b>Enable Salesforce Advanced Currency Management</b> detail in the Pipeline Parameters section on the Pipeline Settings page.</li> </ul> <p>Default: Off<br/>Restart Required: No</p> |
| Enable Salesforce Opportunities Date Change Tracker | <p>This feature enables tracking of the Salesforce opportunities that moved out. The data is available for all related attributes in the Sales subject area.</p> <ul style="list-style-type: none"> <li>• <b>On</b>– Display the <b>Enable Salesforce Opportunities Date Change Tracker</b> detail in the Pipeline Parameters section on the Pipeline Settings page.</li> <li>• <b>Off</b> – Hide the <b>Enable Salesforce Opportunities Data Change Tracker</b> detail in the Pipeline Parameters section on the Pipeline Settings page.</li> </ul> <p>Default: Off<br/>Restart Required: No</p>                                                                                                                                                                                        |

## Prerequisites for Oracle Fusion CX Analytics

Be sure you review and set up these prerequisite requirements to use Fusion CX Analytics and the provided subject areas.

1. Configure and schedule the Sale Historical Snapshots to get daily snapshots of the Sales Pipeline such as the snapshots of opportunity and revenue trends over time. This configuration works for the Sales Pipeline Snapshot functional area and the CX - Opportunity Snapshot, CX - Opportunity Revenue Line Snapshot, and CX - Opportunity Stage Progression subject areas in Oracle Fusion CX Analytics. See [Schedule Snapshots of Your Sales Historical Pipeline](#).
2. (Optional) Set up the integration between Oracle Eloqua and Oracle Cloud CX to share data between the two platforms. See [Oracle CX Sales Integration app](#).

3. (Optional) Set up the integration between Oracle Cloud CX and Oracle Configure, Price, Quote (CPQ) to configure a solution that combines the power of these applications, while reducing the cost of ownership and the time needed to deploy the application. The integration ensures that the:
  - Sales forecasts are reliable and based on real-world quotes
  - Sales orders are valid and contain the correct billing and shipping details to eliminate costly change orders
  - Sales receive the quote data that enables businesses to analyze and improve the overall efficiency of their sales teams

The integration between Oracle Cloud CX and Oracle Configure, Price, Quote supports standard B2B selling processes, which feature highly configurable products, variable or dynamic pricing models, discount negotiations requiring executive approval, and large, branded sales documents. See [Overview of the Oracle Sales and Oracle CPQ Integration](#).

4. To ensure the resource hierarchy works in the subject area, ensure the Reporting Hierarchy Generation ESS job is scheduled in Oracle Fusion Cloud Sales Automation. See [Run Processes to Complete Resource and Resource Hierarchy Creation](#).

# 2

## Tables

### Overview

This section provides information about tables within Oracle Fusion CX Analytics 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 flexfield 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 **24R4\_Fusion\_CX\_Analytics\_Tables.html**.

#### Table Types

The suffixes in table names designate the table type.

- CA, A: Aggregate
- CF, F: Fact
- CF\_DN: Denormalized Fact
- CG, G: General
- D: Dimension
- DH: Dimension Hierarchy
- EF: Extended Fact
- EN: Oracle internal use only
- H: Helper
- P: Prediction
- TL: Translation

### 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\_INV\_ORGANIZATION\_D\_TL
- DW\_FISCAL\_DAY\_D\_NO\_ADJUST

- DW\_INV\_ORGANIZATION\_D

# 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 **24R4\_Fusion\_CX\_Analytics\_Diagrams.html**.

# 4

## Data Store

### Overview

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

Enrich your reports by choosing specific columns from various view objects (VOs) from the Oracle Fusion Cloud Applications 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 Fusion Cloud Applications 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 Analytics BI View Objects for extraction using Data Enrichment in Oracle Fusion Data Intelligence.

# 5

## Data Lineage

### Overview

The Customer Experience Semantic Model Lineage spreadsheet and Metric Calculation Logic spreadsheet for Oracle Fusion CX Analytics provides an end-to-end data lineage summary report for physical and logical relationships in your data.

You can select the subject area for each of the application 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 of the Fusion Applications. The application extracts data for key entities and makes the data available in analysis-friendly data models (tables). Internally, the application 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. extracts data for key entities and makes the data available in analysis-friendly data models (tables). Internally, Oracle Fusion Data Intelligence 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

## Data Validation

### Overview

Oracle Fusion Data Intelligence provides a library of metrics to validate data between your Oracle Fusion Data Intelligence instance and the Oracle Transactional Business Intelligence instance.

You can validate the data after loading the source data in to your data warehouse. You can schedule the validation of your data using the prebuilt validation sets or custom validation sets that you create. You can create a validation set and define the subject area, metrics, and columns that you want to validate and schedule the validation frequency and date. You see the validation sets that you create under Custom Validation Sets in the Scheduled Validation tab. Based on the schedule and the validation set, Oracle Fusion Data Intelligence validates the data and stores the details in the Data Validation workbook available in the Common folder in Oracle Analytics Cloud.



#### Note:

The Fusion user who runs the data validation needs to have these below two roles assigned to them in the Security console:

- BI Administrator Role (BIAdministrator)
- Sales System Integrator (ORA\_ZCA\_SALES\_SYSTEM\_INTEGRATOR)

#### Metrics Spreadsheet

Use this [spreadsheet](#) that contains library of metrics that are supported in Oracle Fusion Data Intelligence.

# 8

## 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

This section details subject area information for Customer Experience data using Oracle Fusion CX Analytics.

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 **24R4\_Fusion\_CX\_Analytics\_SubjectAreas.html**.

### 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</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</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 - Service Request</li> <li>• CX - Service Request Milestone</li> <li>• CX - Service Request Lifecycle</li> </ul>                                                                    | Oracle CX Cloud (Fusion B2B Service)        | 22R2            |

| Offering                                   | Functional Area                              | Activation Dependency *           | Subject Areas Covered                                                                                                                                                                                                                                                                                                   | Source                         | Initial Release |
|--------------------------------------------|----------------------------------------------|-----------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------|-----------------|
| Subscription Analytics                     | Subscription Management Analytics            | None                              | <ul style="list-style-type: none"> <li>• CX - Subscription</li> <li>• CX - Subscription Bill Line</li> </ul>                                                                                                                                                                                                            | Oracle Subscription Management | 22R3            |
| Subscription Analytics                     | Subscription Management Snapshot             | Subscription Management Analytics | <ul style="list-style-type: none"> <li>• CX - Subscription Historical Trend</li> </ul>                                                                                                                                                                                                                                  | Oracle Subscription Management | 22R3            |
| Customer Experience Marketing Analytics    | Marketing Campaign Analytics                 | None                              | <ul style="list-style-type: none"> <li>• CX - Campaign Activity Analysis</li> </ul>                                                                                                                                                                                                                                     | Oracle Eloqua**                | 22R3            |
| Customer Experience Marketing Analytics    | Marketing Campaign Activity Detail Analytics | Marketing Campaign Analytics      | <ul style="list-style-type: none"> <li>• CX - Campaign Activity Detail Analysis</li> </ul>                                                                                                                                                                                                                              | Oracle Eloqua**                | 23R3            |
| Customer Experience Security Configuration | CX Security Data                             | None                              | <ul style="list-style-type: none"> <li>• NA</li> </ul>                                                                                                                                                                                                                                                                  | Oracle CX Cloud (Fusion Sales) | 23R3            |
| Customer Experience Sales Analytics        | CX Resource HCM Worker Analytics             | Sales Pipeline                    | <ul style="list-style-type: none"> <li>• NA</li> </ul>                                                                                                                                                                                                                                                                  | Oracle CX Cloud (Fusion Sales) | 23R3            |
| Salesforce CRM Analytics                   | Salesforce CRM Pipeline                      | None                              | <ul style="list-style-type: none"> <li>• SF - Activity</li> <li>• SF - Leads</li> <li>• SF - Lead Activity</li> <li>• SF - Opportunity</li> <li>• SF - Opportunity Activity</li> <li>• SF - Opportunity Line Item</li> <li>• SF - Opportunity Historical Trend</li> <li>• SF - Opportunity Stage Progression</li> </ul> | Salesforce CRM                 | 24R3            |

| Offering                 | Functional Area                           | Activation Dependency * | Subject Areas Covered                                                                                                                            | Source         | Initial Release |
|--------------------------|-------------------------------------------|-------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------|----------------|-----------------|
| Salesforce CRM Analytics | Salesforce Campaign Closed Loop Analytics | Salesforce CRM Pipeline | <ul style="list-style-type: none"> <li>SF - Campaign Member</li> <li>SF - Campaign Influence</li> <li>SF - Primary Campaign Influence</li> </ul> | Salesforce CRM | 24R3            |

\* The functional area listed must be activated.

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

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

## Security Assignment

### Description

Using the Security Assignment subject area, you can create reports about the current security assignments. These reports enable you to track the security contexts and the users who have access to the security contexts.

### Business Questions

This subject area can answer the following business questions:

- What is the total number of security contexts?
- What is the number of users by security context?
- Which user is assigned to which security context and when was the assignment done?

### Duty Roles

The Security Reporting Duty role secures access to this subject area. See [Common Duty Roles](#).

### Primary Navigation

Folder: /Shared Folders/Common/Security Assignment

Workbook: Security Audit

### Special Considerations

None.

## Security Audit History

This section is applicable for CX Subscription Management Analytics only.

### Description

Using the data in the Security Audit History subject area, you can create reports to track assignment of users to groups, groups to roles, and security context members to users.

### Business Questions

This subject area can answer the following business questions:

- When was a group created?
- When was a role created?
- When was a user assigned to or removed from a group?
- When was a user assigned to or removed from a role?
- When was a user assigned to or removed from a security context?

### Duty Roles

The Security Reporting Duty role secures access to this subject area. See [Common Duty Roles](#).

### Primary Navigation

Folder: /Shared Folders/Common/Security Audit History

Workbook: Security Audit

### Special Considerations

None.

## Usage Tracking

### Description

Usage Tracking is a powerful feature that has been available in Oracle Analytics Cloud. In Oracle Fusion Data Intelligence 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 business metrics, 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 business metrics show progress towards such goals.

This subject area includes details of logical queries that provide insights on the types of queries generated and their performance. Along with it, the Common - Usage Tracking - Physical Query subject area provides details of physical queries sent to the database. These details can help you understand query execution plans in Autonomous Data Warehouse to

identify areas of improvement in report creation. Both subject areas have the Logical query folder with a common set of attributes, that you can use to join a logical or semantic query to its physical database queries. Together, they provide valuable insights to track performance of the Oracle Analytics platform and help you design reports and visualizations that can perform optimally. This subject area provides you the ability to understand the usage and performance of logical and physical queries generated by the Oracle Fusion Data Intelligence semantic model, including customer created extensions. You can use the usage tracking data to analyze query performance and to understand the patterns of physical queries that are sent to the database and the execution plans that are generated in autonomous data warehouse. You can view the details of the physical queries generated for each logical query and their performance metrics such as row counts and time elapsed. This information is especially relevant in these scenarios:

- While creating new custom content adhering to the recommended practices.
- When you want to provide additional data points for the prebuilt reports while reporting performance problems and want to add metrics such as row counts, compilation time, and response times.

### 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?
- What are the top 10 logical and physical queries by execution time?
- Which dashboards and visualizations are the slowest performing?

### 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.

## Warehouse Refresh Statistics

### Description

The Warehouse Refresh Statistics subject area provides valuable information on pipeline activity and performance. You can use this subject area to create analytics on data refreshes,

pipeline jobs, job failures, and details on rejected records. Together with data validation, this subject area helps reconcile data between the Oracle Fusion Cloud Applications source module and Oracle Fusion Data Intelligence, and improve data quality over time.

### Business Questions

This subject area can answer the following business questions:

- When was the warehouse last refreshed, by each module?
- Which modules have high percentage of rejected records?
- What are the specific records that have been rejected for a certain module?
- What errors did the pipeline encounter, by specific jobs?
- Which jobs fail most frequently?
- What are the cascading effects, for example what other related records also fail due to a certain failure of a job?

### Duty Roles

The Data Warehouse Refresh Analysis Duty role secures access to this subject area. See [Common Duty Roles](#).

### Primary Navigation

Folder: /Shared Folders/Common/Warehouse Refresh Statistics

Workbook: Warehouse Refresh Statistics

### Special Considerations

None.

## 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

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.

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 **24R4\_Fusion\_CX\_Analytics\_BQs.html**.



#### Note:

Job roles are the same as job-specific groups.

# Job-Specific Groups

## Overview

This section provides job-specific groups that can be used to secure access to the subject area.



### Note:

Job roles are the same as job-specific groups.

| Job-Specific<br>Group Code              | Job-Specific<br>Group Name | Description                      | Associated<br>Application Roles                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | Functional Area |
|-----------------------------------------|----------------------------|----------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------|
| ORA_ZBS_SALES<br>_ADMINISTRATOR<br>_JOB | Sales Administrator        | Sales Administrator<br>Job Group | OA4F_CX_CAMPA<br>IGN_MEMBERS_D<br>UTY<br><br>OA4F_CX_CAMPA<br>IGN_OPTY_REVN<br>_DUTY<br><br>OA4F_CONTENT_<br>REPORTING_CON<br>FIG<br><br>OA4F_CX_SALES<br>_LEAD_ACTIVITY_<br>DUTY<br><br>OA4F_CX_LEADS<br>_DUTY<br><br>OA4F_CX_SALES<br>_LEAD_CUSTOM_<br>DATA<br><br>OA4F_CX_SALES<br>_LEADS_DATA<br><br>OA4F_CX_OPTY_<br>ANALYSIS_DUTY<br><br>OA4F_CX_SALES<br>_OPTY_CUSTOM_<br>DATA<br><br>OA4F_CX_SALES<br>_OPTY_DATA<br><br>OA4F_CX_REVN_<br>LINE_ANALYSIS_<br>DUTY<br><br>OA4F_CX_REVN_<br>LINE_SNP_ANALY<br>SIS_DUTY<br><br>OA4F_CX_OPTY_<br>SNP_ANALYSIS_D<br>UTY<br><br>OA4F_CX_OPTY_<br>PROG_ANALYSIS_<br>DUTY<br><br>OA4F_CX_SALES<br>_ACCNT_DATA<br><br>OA4F_CX_SALES<br>_ACTIVITY_DUTY<br><br>OA4F_CX_SALES<br>_ACTIVITY_ASSIG<br>NEE_DATA<br><br>OA4F_CX_SALES<br>_ACTIVITY_DELE<br>GATOR_DATA<br><br>OA4F_CX_SALES<br>_ACTIVITY_RES_<br>HIER_DATA | CX Sales        |

| Job-Specific<br>Group Code | Job-Specific<br>Group Name | Description | Associated<br>Application Roles                             | Functional Area |
|----------------------------|----------------------------|-------------|-------------------------------------------------------------|-----------------|
|                            |                            |             | OA4F_CX_SALES<br>_ACTIVITY_CUST<br>OM_DATA                  |                 |
|                            |                            |             | OA4F_CX_SALES<br>_OPPORTUNITY_<br>ACTIVITY_DUTY             |                 |
|                            |                            |             | OA4F_CX_SALES<br>_OPTY_QUOTE_A<br>NALYSIS_DUTY              |                 |
|                            |                            |             | OA4F_CX_SALES<br>_OPTY_QUOTE_C<br>USTOM_DATA                |                 |
|                            |                            |             | OA4F_CX_SERVIC<br>E_REQUEST_ANA<br>LYSIS_DUTY               |                 |
|                            |                            |             | OA4F_CX_SERVIC<br>E_REQUEST_CUS<br>TOM_DATA                 |                 |
|                            |                            |             | OA4F_CX_SERVIC<br>E_REQUEST_ALL<br>_DATA                    |                 |
|                            |                            |             | OA4F_CX_SALES<br>_OPPTY_QUOTE_<br>LINE_ANALYSIS_<br>DUTY    |                 |
|                            |                            |             | OA4F_CX_CAMPA<br>IGN_MEMBERS_C<br>ONTENT_DUTY               |                 |
|                            |                            |             | OA4F_CX_SALES<br>_LEAD_ACTIVITY_<br>CONTENT_DUTY            |                 |
|                            |                            |             | OA4F_CX_LEADS<br>_CONTENT_DUTY                              |                 |
|                            |                            |             | OA4F_CX_OPTY_<br>ANALYSIS_CONT<br>ENT_DUTY                  |                 |
|                            |                            |             | OA4F_CX_REVN_<br>LINE_ANALYSIS_<br>CONTENT_DUTY             |                 |
|                            |                            |             | OA4F_CX_REVN_<br>LINE_SNP_ANALY<br>SIS_CONTENT_D<br>UTY     |                 |
|                            |                            |             | OA4F_CX_OPTY_<br>SNP_ANALYSIS_C<br>ONTENT_DUTY              |                 |
|                            |                            |             | OA4F_CX_OPTY_<br>PROG_ANALYSIS_<br>CONTENT_DUTY             |                 |
|                            |                            |             | OA4F_CX_SALES<br>_ACTIVITY_CONT<br>ENT_DUTY                 |                 |
|                            |                            |             | OA4F_CX_SALES<br>_OPPORTUNITY_<br>_ACTIVITY_CUST<br>OM_DATA |                 |

| Job-Specific<br>Group Code | Job-Specific<br>Group Name | Description | Associated<br>Application Roles                                         | Functional Area |
|----------------------------|----------------------------|-------------|-------------------------------------------------------------------------|-----------------|
|                            |                            |             | ACTIVITY_CONTE<br>NT_DUTY                                               |                 |
|                            |                            |             | OA4F_CX_SALES<br>_OPTY_QUOTE_A<br>NALYSIS_CONTE<br>NT_DUTY              |                 |
|                            |                            |             | OA4F_CX_SERVIC<br>E_REQUEST_ANA<br>LYSIS_CONTENT_<br>DUTY               |                 |
|                            |                            |             | OA4F_CX_SALES<br>_OPPTY_QUOTE_<br>LINE_ANALYSIS_<br>CONTENT_DUTY        |                 |
|                            |                            |             | OA4F_CX_SERVIC<br>E_REQUEST_LIFE<br>CYCLE_ANALYSIS<br>_CONTENT_DUTY     |                 |
|                            |                            |             | OA4F_CX_SERVIC<br>E_REQUEST_MIL<br>ESTONE_ANALYSI<br>S_CONTENT_DUT<br>Y |                 |
|                            |                            |             | OA4F_CX_SALES<br>_PIPELINE_OAC_<br>CONTENT_DUTY                         |                 |
|                            |                            |             | OA4F_CX_WIN_L<br>OSS_OAC_CONT<br>ENT_DUTY                               |                 |
|                            |                            |             | OA4F_CX_SALES<br>_ACTIVITY_OAC_<br>CONTENT_DUTY                         |                 |
|                            |                            |             | OA4F_CX_LEADS<br>_OAC_CONTENT_<br>DUTY                                  |                 |
|                            |                            |             | OA4F_CX_CAMPA<br>IGN_EFFECTIVEN<br>ESS_OAC_CONTE<br>NT_DUTY             |                 |
|                            |                            |             | OA4F_CX_OPPOR<br>TUNITY_QUOTES<br>_OAC_CONTENT_<br>DUTY                 |                 |
|                            |                            |             | OA4F_CX_SR_MA<br>NAGEMENT_OAC<br>_CONTENT_DUTY                          |                 |
|                            |                            |             | OA4F_CX_RENE<br>WAL_SALES_OAC<br>_CONTENT_DUTY                          |                 |
|                            |                            |             | OA4F_CX_LEAD_<br>CONVERSION_OA<br>C_CONTENT_DUT<br>Y                    |                 |
|                            |                            |             | OA4F_CX_CAMPA<br>IGN_ACTIVITY_AN                                        |                 |

| Job-Specific<br>Group Code | Job-Specific<br>Group Name | Description | Associated<br>Application Roles                                          | Functional Area |
|----------------------------|----------------------------|-------------|--------------------------------------------------------------------------|-----------------|
|                            |                            |             | ALYSIS_OAC_CO<br>NTENT_DUTY                                              |                 |
|                            |                            |             | OA4F_CX_CAMPA<br>IGN_MEMBERS_O<br>AC_CONTENT_DU<br>TY                    |                 |
|                            |                            |             | OA4F_CX_SALES<br>_ACTIVITY_OAC_<br>CONTENT_DUTY                          |                 |
|                            |                            |             | OA4F_CX_SALES<br>_LEAD_ACTIVITY_<br>OAC_CONTENT_D<br>UTY                 |                 |
|                            |                            |             | OA4F_CX_SALES<br>_OPPORTUNITY_<br>ACTIVITY_OAC_C<br>ONTENT_DUTY          |                 |
|                            |                            |             | OA4F_CX_LEADS<br>_OAC_CONTENT_<br>DUTY                                   |                 |
|                            |                            |             | OA4F_CX_OPTY_<br>ANALYSIS_OAC_C<br>ONTENT_DUTY                           |                 |
|                            |                            |             | OA4F_CX_REVN_<br>LINE_ANALYSIS_<br>OAC_CONTENT_D<br>UTY                  |                 |
|                            |                            |             | OA4F_CX_OPTY_<br>SNP_ANALYSIS_O<br>AC_CONTENT_DU<br>TY                   |                 |
|                            |                            |             | OA4F_CX_REVN_<br>LINE_SNP_ANALY<br>SIS_OAC_CONTE<br>NT_DUTY              |                 |
|                            |                            |             | OA4F_CX_OPTY_<br>PROG_ANALYSIS_<br>OAC_CONTENT_D<br>UTY                  |                 |
|                            |                            |             | OA4F_CX_SALES<br>_OPTY_QUOTE_A<br>NALYSIS_OAC_C<br>ONTENT_DUTY           |                 |
|                            |                            |             | OA4F_CX_SALES<br>_OPPTY_QUOTE_<br>LINE_ANALYSIS_<br>OAC_CONTENT_D<br>UTY |                 |
|                            |                            |             | OA4F_CX_SERVIC<br>E_REQUEST_ANA<br>LYSIS_OAC_CONT<br>ENT_DUTY            |                 |
|                            |                            |             | OA4F_CX_SERVIC<br>E_REQUEST_LIFE<br>CYCLE_ANALYSIS                       |                 |

| Job-Specific<br>Group Code | Job-Specific<br>Group Name | Description | Associated<br>Application Roles                                             | Functional Area |
|----------------------------|----------------------------|-------------|-----------------------------------------------------------------------------|-----------------|
|                            |                            |             | _OAC_CONTENT_<br>DUTY                                                       |                 |
|                            |                            |             | OA4F_CX_SERVIC<br>E_REQUEST_MIL<br>ESTONE_ANALYSI<br>S_OAC_CONTENT<br>_DUTY |                 |
|                            |                            |             | OA4F_CX_CAMPA<br>IGN_OPTY_REVE<br>NUE_ANALYSIS_D<br>UTY                     |                 |
|                            |                            |             | OA4F_CX_CAMPA<br>IGN_OPTY_REVE<br>NUE_ANALYSIS_C<br>ONTENT_DUTY             |                 |
|                            |                            |             | OA4F_CX_CAMPA<br>IGN_OPTY_REVE<br>NUE_ANALYSIS_O<br>AC_CONTENT_DU<br>TY     |                 |

| Job-Specific<br>Group Code | Job-Specific<br>Group Name | Description           | Associated<br>Application Roles                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | Functional Area |
|----------------------------|----------------------------|-----------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------|
| ORA_ZBS_SALES<br>_VP_JOB   | Sales VP                   | Sales VP Job<br>Group | OA4F_CX_CAMPA<br>IGN_MEMBERS_D<br>UTY<br><br>OA4F_CX_CAMPA<br>IGN_OPTY_REVN<br>_DUTY<br><br>OA4F_CONTENT_<br>REPORTING_CON<br>FIG<br><br>OA4F_CX_SALES<br>_LEAD_ACTIVITY_<br>DUTY<br><br>OA4F_CX_LEADS<br>_DUTY<br><br>OA4F_CX_SALES<br>_LEAD_CUSTOM_<br>DATA<br><br>OA4F_CX_SALES<br>_LEADS_DATA<br><br>OA4F_CX_OPTY_<br>ANALYSIS_DUTY<br><br>OA4F_CX_SALES<br>_OPTY_CUSTOM_<br>DATA<br><br>OA4F_CX_SALES<br>_OPTY_DATA<br><br>OA4F_CX_REVN_<br>LINE_ANALYSIS_<br>DUTY<br><br>OA4F_CX_REVN_<br>LINE_SNP_ANALY<br>SIS_DUTY<br><br>OA4F_CX_OPTY_<br>SNP_ANALYSIS_D<br>UTY<br><br>OA4F_CX_OPTY_<br>PROG_ANALYSIS_<br>DUTY<br><br>OA4F_CX_SALES<br>_ACCNT_DATA<br><br>OA4F_CX_SALES<br>_ACTIVITY_DUTY<br><br>OA4F_CX_SALES<br>_ACTIVITY_ASSIG<br>NEE_DATA<br><br>OA4F_CX_SALES<br>_ACTIVITY_DELE<br>GATOR_DATA<br><br>OA4F_CX_SALES<br>_ACTIVITY_RES_<br>HIER_DATA | CX Sales        |

| Job-Specific<br>Group Code | Job-Specific<br>Group Name | Description | Associated<br>Application Roles                             | Functional Area |
|----------------------------|----------------------------|-------------|-------------------------------------------------------------|-----------------|
|                            |                            |             | OA4F_CX_SALES<br>_ACTIVITY_CUST<br>OM_DATA                  |                 |
|                            |                            |             | OA4F_CX_SALES<br>_OPPORTUNITY_<br>ACTIVITY_DUTY             |                 |
|                            |                            |             | OA4F_CX_SALES<br>_OPTY_QUOTE_A<br>NALYSIS_DUTY              |                 |
|                            |                            |             | OA4F_CX_SALES<br>_OPTY_QUOTE_C<br>USTOM_DATA                |                 |
|                            |                            |             | OA4F_CX_SERVIC<br>E_REQUEST_ANA<br>LYSIS_DUTY               |                 |
|                            |                            |             | OA4F_CX_SERVIC<br>E_REQUEST_CUS<br>TOM_DATA                 |                 |
|                            |                            |             | OA4F_CX_SERVIC<br>E_REQUEST_ALL<br>_DATA                    |                 |
|                            |                            |             | OA4F_CX_SALES<br>_OPPTY_QUOTE_<br>LINE_ANALYSIS_<br>DUTY    |                 |
|                            |                            |             | OA4F_CX_CAMPA<br>IGN_MEMBERS_C<br>ONTENT_DUTY               |                 |
|                            |                            |             | OA4F_CX_SALES<br>_LEAD_ACTIVITY_<br>CONTENT_DUTY            |                 |
|                            |                            |             | OA4F_CX_LEADS<br>_CONTENT_DUTY                              |                 |
|                            |                            |             | OA4F_CX_OPTY_<br>ANALYSIS_CONT<br>ENT_DUTY                  |                 |
|                            |                            |             | OA4F_CX_REVN_<br>LINE_ANALYSIS_<br>CONTENT_DUTY             |                 |
|                            |                            |             | OA4F_CX_REVN_<br>LINE_SNP_ANALY<br>SIS_CONTENT_D<br>UTY     |                 |
|                            |                            |             | OA4F_CX_OPTY_<br>SNP_ANALYSIS_C<br>ONTENT_DUTY              |                 |
|                            |                            |             | OA4F_CX_OPTY_<br>PROG_ANALYSIS_<br>CONTENT_DUTY             |                 |
|                            |                            |             | OA4F_CX_SALES<br>_ACTIVITY_CONT<br>ENT_DUTY                 |                 |
|                            |                            |             | OA4F_CX_SALES<br>_OPPORTUNITY_<br>_ACTIVITY_CUST<br>OM_DATA |                 |

| Job-Specific<br>Group Code | Job-Specific<br>Group Name | Description | Associated<br>Application Roles                                         | Functional Area |
|----------------------------|----------------------------|-------------|-------------------------------------------------------------------------|-----------------|
|                            |                            |             | ACTIVITY_CONTE<br>NT_DUTY                                               |                 |
|                            |                            |             | OA4F_CX_SALES<br>_OPTY_QUOTE_A<br>NALYSIS_CONTE<br>NT_DUTY              |                 |
|                            |                            |             | OA4F_CX_SERVIC<br>E_REQUEST_ANA<br>LYSIS_CONTENT_<br>DUTY               |                 |
|                            |                            |             | OA4F_CX_SALES<br>_OPPTY_QUOTE_<br>LINE_ANALYSIS_<br>CONTENT_DUTY        |                 |
|                            |                            |             | OA4F_CX_SERVIC<br>E_REQUEST_LIFE<br>CYCLE_ANALYSIS<br>_CONTENT_DUTY     |                 |
|                            |                            |             | OA4F_CX_SERVIC<br>E_REQUEST_MIL<br>ESTONE_ANALYSI<br>S_CONTENT_DUT<br>Y |                 |
|                            |                            |             | OA4F_CX_SALES<br>_PIPELINE_OAC_<br>CONTENT_DUTY                         |                 |
|                            |                            |             | OA4F_CX_WIN_L<br>OSS_OAC_CONT<br>ENT_DUTY                               |                 |
|                            |                            |             | OA4F_CX_SALES<br>_ACTIVITY_OAC_<br>CONTENT_DUTY                         |                 |
|                            |                            |             | OA4F_CX_LEADS<br>_OAC_CONTENT_<br>DUTY                                  |                 |
|                            |                            |             | OA4F_CX_CAMPA<br>IGN_EFFECTIVEN<br>ESS_OAC_CONTE<br>NT_DUTY             |                 |
|                            |                            |             | OA4F_CX_OPPOR<br>TUNITY_QUOTES<br>_OAC_CONTENT_<br>DUTY                 |                 |
|                            |                            |             | OA4F_CX_SR_MA<br>NAGEMENT_OAC<br>_CONTENT_DUTY                          |                 |
|                            |                            |             | OA4F_CX_RENE<br>WAL_SALES_OAC<br>_CONTENT_DUTY                          |                 |
|                            |                            |             | OA4F_CX_LEAD_<br>CONVERSION_OA<br>C_CONTENT_DUT<br>Y                    |                 |
|                            |                            |             | OA4F_CX_CAMPA<br>IGN_ACTIVITY_AN                                        |                 |

| Job-Specific<br>Group Code | Job-Specific<br>Group Name | Description | Associated<br>Application Roles                                          | Functional Area |
|----------------------------|----------------------------|-------------|--------------------------------------------------------------------------|-----------------|
|                            |                            |             | ALYSIS_OAC_CO<br>NTENT_DUTY                                              |                 |
|                            |                            |             | OA4F_CX_CAMPA<br>IGN_MEMBERS_O<br>AC_CONTENT_DU<br>TY                    |                 |
|                            |                            |             | OA4F_CX_SALES<br>_ACTIVITY_OAC_<br>CONTENT_DUTY                          |                 |
|                            |                            |             | OA4F_CX_SALES<br>_LEAD_ACTIVITY_<br>OAC_CONTENT_D<br>UTY                 |                 |
|                            |                            |             | OA4F_CX_SALES<br>_OPPORTUNITY_<br>ACTIVITY_OAC_C<br>ONTENT_DUTY          |                 |
|                            |                            |             | OA4F_CX_LEADS<br>_OAC_CONTENT_<br>DUTY                                   |                 |
|                            |                            |             | OA4F_CX_OPTY_<br>ANALYSIS_OAC_C<br>ONTENT_DUTY                           |                 |
|                            |                            |             | OA4F_CX_REVN_<br>LINE_ANALYSIS_<br>OAC_CONTENT_D<br>UTY                  |                 |
|                            |                            |             | OA4F_CX_OPTY_<br>SNP_ANALYSIS_O<br>AC_CONTENT_DU<br>TY                   |                 |
|                            |                            |             | OA4F_CX_REVN_<br>LINE_SNP_ANALY<br>SIS_OAC_CONTE<br>NT_DUTY              |                 |
|                            |                            |             | OA4F_CX_OPTY_<br>PROG_ANALYSIS_<br>OAC_CONTENT_D<br>UTY                  |                 |
|                            |                            |             | OA4F_CX_SALES<br>_OPTY_QUOTE_A<br>NALYSIS_OAC_C<br>ONTENT_DUTY           |                 |
|                            |                            |             | OA4F_CX_SALES<br>_OPPTY_QUOTE_<br>LINE_ANALYSIS_<br>OAC_CONTENT_D<br>UTY |                 |
|                            |                            |             | OA4F_CX_SERVIC<br>E_REQUEST_ANA<br>LYSIS_OAC_CONT<br>ENT_DUTY            |                 |
|                            |                            |             | OA4F_CX_SERVIC<br>E_REQUEST_LIFE<br>CYCLE_ANALYSIS                       |                 |

| Job-Specific<br>Group Code | Job-Specific<br>Group Name | Description | Associated<br>Application Roles                                             | Functional Area |
|----------------------------|----------------------------|-------------|-----------------------------------------------------------------------------|-----------------|
|                            |                            |             | _OAC_CONTENT_<br>DUTY                                                       |                 |
|                            |                            |             | OA4F_CX_SERVIC<br>E_REQUEST_MIL<br>ESTONE_ANALYSI<br>S_OAC_CONTENT<br>_DUTY |                 |
|                            |                            |             | OA4F_CX_CAMPA<br>IGN_OPTY_REVE<br>NUE_ANALYSIS_D<br>UTY                     |                 |
|                            |                            |             | OA4F_CX_CAMPA<br>IGN_OPTY_REVE<br>NUE_ANALYSIS_C<br>ONTENT_DUTY             |                 |
|                            |                            |             | OA4F_CX_CAMPA<br>IGN_OPTY_REVE<br>NUE_ANALYSIS_O<br>AC_CONTENT_DU<br>TY     |                 |

| Job-Specific Group Code   | Job-Specific Group Name | Description             | Associated Application Roles                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | Functional Area |
|---------------------------|-------------------------|-------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------|
| ORA_ZBS_SALES_MANAGER_JOB | Sales Manager           | Sales Manager Job Group | OA4F_CX_CAMPAIGN_MEMBERS_DUTY<br>OA4F_CX_CAMPAIGN_OPTY_REVN_DUTY<br>OA4F_CONTENT_REPORTING_CONFIG<br>OA4F_CX_SALES_LEAD_ACTIVITY_DUTY<br>OA4F_CX_LEADS_DUTY<br>OA4F_CX_SALES_LEAD_CUSTOM_DATA<br>OA4F_CX_SALES_LEADS_DATA<br>OA4F_CX_OPTY_ANALYSIS_DUTY<br>OA4F_CX_SALES_OPTY_CUSTOM_DATA<br>OA4F_CX_SALES_OPTY_DATA<br>OA4F_CX_REVN_LINE_ANALYSIS_DUTY<br>OA4F_CX_REVN_LINE_SNP_ANALYSIS_DUTY<br>OA4F_CX_OPTY_SNP_ANALYSIS_DUTY<br>OA4F_CX_OPTY_PROG_ANALYSIS_DUTY<br>OA4F_CX_SALES_ACCNT_DATA<br>OA4F_CX_SALES_ACTIVITY_DUTY<br>OA4F_CX_SALES_ACTIVITY_ASSIGNEE_DATA<br>OA4F_CX_SALES_ACTIVITY_DELEGATOR_DATA<br>OA4F_CX_SALES_ACTIVITY_RES_HIER_DATA | CX Sales        |

| Job-Specific<br>Group Code | Job-Specific<br>Group Name | Description | Associated<br>Application Roles                             | Functional Area |
|----------------------------|----------------------------|-------------|-------------------------------------------------------------|-----------------|
|                            |                            |             | OA4F_CX_SALES<br>_ACTIVITY_CUST<br>OM_DATA                  |                 |
|                            |                            |             | OA4F_CX_SALES<br>_OPPORTUNITY_<br>ACTIVITY_DUTY             |                 |
|                            |                            |             | OA4F_CX_SALES<br>_OPTY_QUOTE_A<br>NALYSIS_DUTY              |                 |
|                            |                            |             | OA4F_CX_SALES<br>_OPTY_QUOTE_C<br>USTOM_DATA                |                 |
|                            |                            |             | OA4F_CX_SERVIC<br>E_REQUEST_ANA<br>LYSIS_DUTY               |                 |
|                            |                            |             | OA4F_CX_SERVIC<br>E_REQUEST_CUS<br>TOM_DATA                 |                 |
|                            |                            |             | OA4F_CX_SERVIC<br>E_REQUEST_ALL<br>_DATA                    |                 |
|                            |                            |             | OA4F_CX_SALES<br>_OPPTY_QUOTE_<br>LINE_ANALYSIS_<br>DUTY    |                 |
|                            |                            |             | OA4F_CX_CAMPA<br>IGN_MEMBERS_C<br>ONTENT_DUTY               |                 |
|                            |                            |             | OA4F_CX_SALES<br>_LEAD_ACTIVITY_<br>CONTENT_DUTY            |                 |
|                            |                            |             | OA4F_CX_LEADS<br>_CONTENT_DUTY                              |                 |
|                            |                            |             | OA4F_CX_OPTY_<br>ANALYSIS_CONT<br>ENT_DUTY                  |                 |
|                            |                            |             | OA4F_CX_REVN_<br>LINE_ANALYSIS_<br>CONTENT_DUTY             |                 |
|                            |                            |             | OA4F_CX_REVN_<br>LINE_SNP_ANALY<br>SIS_CONTENT_D<br>UTY     |                 |
|                            |                            |             | OA4F_CX_OPTY_<br>SNP_ANALYSIS_C<br>ONTENT_DUTY              |                 |
|                            |                            |             | OA4F_CX_OPTY_<br>PROG_ANALYSIS_<br>CONTENT_DUTY             |                 |
|                            |                            |             | OA4F_CX_SALES<br>_ACTIVITY_CONT<br>ENT_DUTY                 |                 |
|                            |                            |             | OA4F_CX_SALES<br>_OPPORTUNITY_<br>_ACTIVITY_CUST<br>OM_DATA |                 |

| Job-Specific<br>Group Code | Job-Specific<br>Group Name | Description | Associated<br>Application Roles                                         | Functional Area |
|----------------------------|----------------------------|-------------|-------------------------------------------------------------------------|-----------------|
|                            |                            |             | ACTIVITY_CONTE<br>NT_DUTY                                               |                 |
|                            |                            |             | OA4F_CX_SALES<br>_OPTY_QUOTE_A<br>NALYSIS_CONTE<br>NT_DUTY              |                 |
|                            |                            |             | OA4F_CX_SERVIC<br>E_REQUEST_ANA<br>LYSIS_CONTENT_<br>DUTY               |                 |
|                            |                            |             | OA4F_CX_SALES<br>_OPPTY_QUOTE_<br>LINE_ANALYSIS_<br>CONTENT_DUTY        |                 |
|                            |                            |             | OA4F_CX_SERVIC<br>E_REQUEST_LIFE<br>CYCLE_ANALYSIS<br>_CONTENT_DUTY     |                 |
|                            |                            |             | OA4F_CX_SERVIC<br>E_REQUEST_MIL<br>ESTONE_ANALYSI<br>S_CONTENT_DUT<br>Y |                 |
|                            |                            |             | OA4F_CX_SALES<br>_PIPELINE_OAC_<br>CONTENT_DUTY                         |                 |
|                            |                            |             | OA4F_CX_WIN_L<br>OSS_OAC_CONT<br>ENT_DUTY                               |                 |
|                            |                            |             | OA4F_CX_SALES<br>_ACTIVITY_OAC_<br>CONTENT_DUTY                         |                 |
|                            |                            |             | OA4F_CX_LEADS<br>_OAC_CONTENT_<br>DUTY                                  |                 |
|                            |                            |             | OA4F_CX_CAMPA<br>IGN_EFFECTIVEN<br>ESS_OAC_CONTE<br>NT_DUTY             |                 |
|                            |                            |             | OA4F_CX_OPPOR<br>TUNITY_QUOTES<br>_OAC_CONTENT_<br>DUTY                 |                 |
|                            |                            |             | OA4F_CX_SR_MA<br>NAGEMENT_OAC<br>_CONTENT_DUTY                          |                 |
|                            |                            |             | OA4F_CX_RENE<br>WAL_SALES_OAC<br>_CONTENT_DUTY                          |                 |
|                            |                            |             | OA4F_CX_LEAD_<br>CONVERSION_OA<br>C_CONTENT_DUT<br>Y                    |                 |
|                            |                            |             | OA4F_CX_CAMPA<br>IGN_ACTIVITY_AN                                        |                 |

| Job-Specific<br>Group Code | Job-Specific<br>Group Name | Description | Associated<br>Application Roles                                          | Functional Area |
|----------------------------|----------------------------|-------------|--------------------------------------------------------------------------|-----------------|
|                            |                            |             | ALYSIS_OAC_CO<br>NTENT_DUTY                                              |                 |
|                            |                            |             | OA4F_CX_CAMPA<br>IGN_MEMBERS_O<br>AC_CONTENT_DU<br>TY                    |                 |
|                            |                            |             | OA4F_CX_SALES<br>_ACTIVITY_OAC_<br>CONTENT_DUTY                          |                 |
|                            |                            |             | OA4F_CX_SALES<br>_LEAD_ACTIVITY_<br>OAC_CONTENT_D<br>UTY                 |                 |
|                            |                            |             | OA4F_CX_SALES<br>_OPPORTUNITY_<br>ACTIVITY_OAC_C<br>ONTENT_DUTY          |                 |
|                            |                            |             | OA4F_CX_LEADS<br>_OAC_CONTENT_<br>DUTY                                   |                 |
|                            |                            |             | OA4F_CX_OPTY_<br>ANALYSIS_OAC_C<br>ONTENT_DUTY                           |                 |
|                            |                            |             | OA4F_CX_REVN_<br>LINE_ANALYSIS_<br>OAC_CONTENT_D<br>UTY                  |                 |
|                            |                            |             | OA4F_CX_OPTY_<br>SNP_ANALYSIS_O<br>AC_CONTENT_DU<br>TY                   |                 |
|                            |                            |             | OA4F_CX_REVN_<br>LINE_SNP_ANALY<br>SIS_OAC_CONTE<br>NT_DUTY              |                 |
|                            |                            |             | OA4F_CX_OPTY_<br>PROG_ANALYSIS_<br>OAC_CONTENT_D<br>UTY                  |                 |
|                            |                            |             | OA4F_CX_SALES<br>_OPTY_QUOTE_A<br>NALYSIS_OAC_C<br>ONTENT_DUTY           |                 |
|                            |                            |             | OA4F_CX_SALES<br>_OPPTY_QUOTE_<br>LINE_ANALYSIS_<br>OAC_CONTENT_D<br>UTY |                 |
|                            |                            |             | OA4F_CX_SERVIC<br>E_REQUEST_ANA<br>LYSIS_OAC_CONT<br>ENT_DUTY            |                 |
|                            |                            |             | OA4F_CX_SERVIC<br>E_REQUEST_LIFE<br>CYCLE_ANALYSIS                       |                 |

| Job-Specific<br>Group Code | Job-Specific<br>Group Name | Description | Associated<br>Application Roles                                                                                                                                                                                                                                                                               | Functional Area |
|----------------------------|----------------------------|-------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------|
|                            |                            |             | _OAC_CONTENT_<br>DUTY<br>OA4F_CX_SERVIC<br>E_REQUEST_MIL<br>ESTONE_ANALYSI<br>S_OAC_CONTENT<br>_DUTY<br>OA4F_CX_CAMPA<br>IGN_OPTY_REVE<br>NUE_ANALYSIS_D<br>UTY<br>OA4F_CX_CAMPA<br>IGN_OPTY_REVE<br>NUE_ANALYSIS_C<br>ONTENT_DUTY<br>OA4F_CX_CAMPA<br>IGN_OPTY_REVE<br>NUE_ANALYSIS_O<br>AC_CONTENT_DU<br>TY |                 |

| Job-Specific Group Code              | Job-Specific Group Name | Description                    | Associated Application Roles                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | Functional Area |
|--------------------------------------|-------------------------|--------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------|
| ORA_ZBS_SALES<br>_REPRESENTATIVE_JOB | Sales Representative    | Sales Representative Job Group | OA4F_CX_CAMP<br>IGN_MEMBERS_D<br>UTY<br><br>OA4F_CX_CAMP<br>IGN_OPTY_REVN<br>_DUTY<br><br>OA4F_CONTENT_<br>REPORTING_CON<br>FIG<br><br>OA4F_CX_SALES<br>_LEAD_ACTIVITY_<br>DUTY<br><br>OA4F_CX_LEADS<br>_DUTY<br><br>OA4F_CX_SALES<br>_LEAD_CUSTOM_<br>DATA<br><br>OA4F_CX_SALES<br>_LEADS_DATA<br><br>OA4F_CX_OPTY_<br>ANALYSIS_DUTY<br><br>OA4F_CX_SALES<br>_OPTY_CUSTOM_<br>DATA<br><br>OA4F_CX_SALES<br>_OPTY_DATA<br><br>OA4F_CX_REVN_<br>LINE_ANALYSIS_<br>DUTY<br><br>OA4F_CX_REVN_<br>LINE_SNP_ANALY<br>SIS_DUTY<br><br>OA4F_CX_OPTY_<br>SNP_ANALYSIS_D<br>UTY<br><br>OA4F_CX_OPTY_<br>PROG_ANALYSIS_<br>DUTY<br><br>OA4F_CX_SALES<br>_ACCNT_DATA<br><br>OA4F_CX_SALES<br>_ACTIVITY_DUTY<br><br>OA4F_CX_SALES<br>_ACTIVITY_ASSIG<br>NEE_DATA<br><br>OA4F_CX_SALES<br>_ACTIVITY_DELE<br>GATOR_DATA<br><br>OA4F_CX_SALES<br>_ACTIVITY_RES_<br>HIER_DATA | CX Sales        |

| Job-Specific<br>Group Code | Job-Specific<br>Group Name | Description | Associated<br>Application Roles                             | Functional Area |
|----------------------------|----------------------------|-------------|-------------------------------------------------------------|-----------------|
|                            |                            |             | OA4F_CX_SALES<br>_ACTIVITY_CUST<br>OM_DATA                  |                 |
|                            |                            |             | OA4F_CX_SALES<br>_OPPORTUNITY_<br>ACTIVITY_DUTY             |                 |
|                            |                            |             | OA4F_CX_SALES<br>_OPTY_QUOTE_A<br>NALYSIS_DUTY              |                 |
|                            |                            |             | OA4F_CX_SALES<br>_OPTY_QUOTE_C<br>USTOM_DATA                |                 |
|                            |                            |             | OA4F_CX_SERVIC<br>E_REQUEST_ANA<br>LYSIS_DUTY               |                 |
|                            |                            |             | OA4F_CX_SERVIC<br>E_REQUEST_CUS<br>TOM_DATA                 |                 |
|                            |                            |             | OA4F_CX_SERVIC<br>E_REQUEST_ALL<br>_DATA                    |                 |
|                            |                            |             | OA4F_CX_SALES<br>_OPPTY_QUOTE_<br>LINE_ANALYSIS_<br>DUTY    |                 |
|                            |                            |             | OA4F_CX_CAMPA<br>IGN_MEMBERS_C<br>ONTENT_DUTY               |                 |
|                            |                            |             | OA4F_CX_SALES<br>_LEAD_ACTIVITY_<br>CONTENT_DUTY            |                 |
|                            |                            |             | OA4F_CX_LEADS<br>_CONTENT_DUTY                              |                 |
|                            |                            |             | OA4F_CX_OPTY_<br>ANALYSIS_CONT<br>ENT_DUTY                  |                 |
|                            |                            |             | OA4F_CX_REVN_<br>LINE_ANALYSIS_<br>CONTENT_DUTY             |                 |
|                            |                            |             | OA4F_CX_REVN_<br>LINE_SNP_ANALY<br>SIS_CONTENT_D<br>UTY     |                 |
|                            |                            |             | OA4F_CX_OPTY_<br>SNP_ANALYSIS_C<br>ONTENT_DUTY              |                 |
|                            |                            |             | OA4F_CX_OPTY_<br>PROG_ANALYSIS_<br>CONTENT_DUTY             |                 |
|                            |                            |             | OA4F_CX_SALES<br>_ACTIVITY_CONT<br>ENT_DUTY                 |                 |
|                            |                            |             | OA4F_CX_SALES<br>_OPPORTUNITY_<br>_ACTIVITY_CUST<br>OM_DATA |                 |

| Job-Specific<br>Group Code | Job-Specific<br>Group Name | Description | Associated<br>Application Roles                                         | Functional Area |
|----------------------------|----------------------------|-------------|-------------------------------------------------------------------------|-----------------|
|                            |                            |             | ACTIVITY_CONTE<br>NT_DUTY                                               |                 |
|                            |                            |             | OA4F_CX_SALES<br>_OPTY_QUOTE_A<br>NALYSIS_CONTE<br>NT_DUTY              |                 |
|                            |                            |             | OA4F_CX_SERVIC<br>E_REQUEST_ANA<br>LYSIS_CONTENT_<br>DUTY               |                 |
|                            |                            |             | OA4F_CX_SALES<br>_OPPTY_QUOTE_<br>LINE_ANALYSIS_<br>CONTENT_DUTY        |                 |
|                            |                            |             | OA4F_CX_SERVIC<br>E_REQUEST_LIFE<br>CYCLE_ANALYSIS<br>_CONTENT_DUTY     |                 |
|                            |                            |             | OA4F_CX_SERVIC<br>E_REQUEST_MIL<br>ESTONE_ANALYSI<br>S_CONTENT_DUT<br>Y |                 |
|                            |                            |             | OA4F_CX_SALES<br>_PIPELINE_OAC_<br>CONTENT_DUTY                         |                 |
|                            |                            |             | OA4F_CX_WIN_L<br>OSS_OAC_CONT<br>ENT_DUTY                               |                 |
|                            |                            |             | OA4F_CX_SALES<br>_ACTIVITY_OAC_<br>CONTENT_DUTY                         |                 |
|                            |                            |             | OA4F_CX_LEADS<br>_OAC_CONTENT_<br>DUTY                                  |                 |
|                            |                            |             | OA4F_CX_CAMPA<br>IGN_EFFECTIVEN<br>ESS_OAC_CONTE<br>NT_DUTY             |                 |
|                            |                            |             | OA4F_CX_OPPOR<br>TUNITY_QUOTES<br>_OAC_CONTENT_<br>DUTY                 |                 |
|                            |                            |             | OA4F_CX_SR_MA<br>NAGEMENT_OAC<br>_CONTENT_DUTY                          |                 |
|                            |                            |             | OA4F_CX_RENE<br>WAL_SALES_OAC<br>_CONTENT_DUTY                          |                 |
|                            |                            |             | OA4F_CX_LEAD_<br>CONVERSION_OA<br>C_CONTENT_DUT<br>Y                    |                 |
|                            |                            |             | OA4F_CX_CAMPA<br>IGN_ACTIVITY_AN                                        |                 |

| Job-Specific<br>Group Code | Job-Specific<br>Group Name | Description | Associated<br>Application Roles                                          | Functional Area |
|----------------------------|----------------------------|-------------|--------------------------------------------------------------------------|-----------------|
|                            |                            |             | ALYSIS_OAC_CO<br>NTENT_DUTY                                              |                 |
|                            |                            |             | OA4F_CX_CAMPA<br>IGN_MEMBERS_O<br>AC_CONTENT_DU<br>TY                    |                 |
|                            |                            |             | OA4F_CX_SALES<br>_ACTIVITY_OAC_<br>CONTENT_DUTY                          |                 |
|                            |                            |             | OA4F_CX_SALES<br>_LEAD_ACTIVITY_<br>OAC_CONTENT_D<br>UTY                 |                 |
|                            |                            |             | OA4F_CX_SALES<br>_OPPORTUNITY_<br>ACTIVITY_OAC_C<br>ONTENT_DUTY          |                 |
|                            |                            |             | OA4F_CX_LEADS<br>_OAC_CONTENT_<br>DUTY                                   |                 |
|                            |                            |             | OA4F_CX_OPTY_<br>ANALYSIS_OAC_C<br>ONTENT_DUTY                           |                 |
|                            |                            |             | OA4F_CX_REVN_<br>LINE_ANALYSIS_<br>OAC_CONTENT_D<br>UTY                  |                 |
|                            |                            |             | OA4F_CX_OPTY_<br>SNP_ANALYSIS_O<br>AC_CONTENT_DU<br>TY                   |                 |
|                            |                            |             | OA4F_CX_REVN_<br>LINE_SNP_ANALY<br>SIS_OAC_CONTE<br>NT_DUTY              |                 |
|                            |                            |             | OA4F_CX_OPTY_<br>PROG_ANALYSIS_<br>OAC_CONTENT_D<br>UTY                  |                 |
|                            |                            |             | OA4F_CX_SALES<br>_OPTY_QUOTE_A<br>NALYSIS_OAC_C<br>ONTENT_DUTY           |                 |
|                            |                            |             | OA4F_CX_SALES<br>_OPPTY_QUOTE_<br>LINE_ANALYSIS_<br>OAC_CONTENT_D<br>UTY |                 |
|                            |                            |             | OA4F_CX_SERVIC<br>E_REQUEST_ANA<br>LYSIS_OAC_CONT<br>ENT_DUTY            |                 |
|                            |                            |             | OA4F_CX_SERVIC<br>E_REQUEST_LIFE<br>CYCLE_ANALYSIS                       |                 |

| Job-Specific<br>Group Code | Job-Specific<br>Group Name | Description | Associated<br>Application Roles                                             | Functional Area |
|----------------------------|----------------------------|-------------|-----------------------------------------------------------------------------|-----------------|
|                            |                            |             | _OAC_CONTENT_<br>DUTY                                                       |                 |
|                            |                            |             | OA4F_CX_SERVIC<br>E_REQUEST_MIL<br>ESTONE_ANALYSI<br>S_OAC_CONTENT<br>_DUTY |                 |
|                            |                            |             | OA4F_CX_CAMPA<br>IGN_OPTY_REVE<br>NUE_ANALYSIS_D<br>UTY                     |                 |
|                            |                            |             | OA4F_CX_CAMPA<br>IGN_OPTY_REVE<br>NUE_ANALYSIS_C<br>ONTENT_DUTY             |                 |
|                            |                            |             | OA4F_CX_CAMPA<br>IGN_OPTY_REVE<br>NUE_ANALYSIS_O<br>AC_CONTENT_DU<br>TY     |                 |

| Job-Specific Group Code                                 | Job-Specific Group Name         | Description                               | Associated Application Roles                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | Functional Area |
|---------------------------------------------------------|---------------------------------|-------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------|
| ORA_SVC_CUST<br>OMER_SERVICE_<br>REPRESENTATIVE<br>_JOB | Customer Service Representative | Customer Service Representative Job Group | OA4F_CX_SERVICE_REQUEST_ANALYSIS_DUTY<br>OA4F_CX_SERVICE_REQUEST_LIFECYCLE_ANALYSIS_DUTY<br>OA4F_CX_SERVICE_REQUEST_MILESTONE_ANALYSIS_DUTY<br>OA4F_CX_SERVICE_REQUEST_ANALYSIS_CONTENT_DUTY<br>OA4F_CX_SERVICE_REQUEST_LIFECYCLE_ANALYSIS_CONTENT_DUTY<br>OA4F_CX_SERVICE_REQUEST_MILESTONE_ANALYSIS_CONTENT_DUTY<br>OA4F_CX_SR_MANAGEMENT_OAC_CONTENT_DUTY<br>OA4F_CX_SERVICE_REQUEST_ANALYSIS_OAC_CONTENT_DUTY<br>OA4F_CX_SERVICE_REQUEST_LIFECYCLE_ANALYSIS_OAC_CONTENT_DUTY<br>OA4F_CX_SERVICE_REQUEST_MILESTONE_ANALYSIS_OAC_CONTENT_DUTY | CX Service      |

| Job-Specific Group Code                      | Job-Specific Group Name     | Description                              | Associated Application Roles                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | Functional Area |
|----------------------------------------------|-----------------------------|------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------|
| ORA_SVC_CUST<br>OMER_SERVICE_<br>MANAGER_JOB | Customer Service<br>Manager | Customer Service<br>Manager Job<br>Group | OA4F_CX_SERVIC<br>E_REQUEST_ANA<br>LYSIS_DUTY<br><br>OA4F_CX_SERVIC<br>E_REQUEST_LIFE<br>CYCLE_ANALYSIS<br>_DUTY<br><br>OA4F_CX_SERVIC<br>E_REQUEST_MIL<br>ESTONE_ANALYSI<br>S_DUTY<br><br>OA4F_CX_SERVIC<br>E_REQUEST_ANA<br>LYSIS_CONTENT_<br>DUTY<br><br>OA4F_CX_SERVIC<br>E_REQUEST_LIFE<br>CYCLE_ANALYSIS<br>_CONTENT_DUTY<br><br>OA4F_CX_SERVIC<br>E_REQUEST_MIL<br>ESTONE_ANALYSI<br>S_CONTENT_DUT<br>Y<br><br>OA4F_CX_SR_MA<br>NAGEMENT_OAC<br>_CONTENT_DUTY<br><br>OA4F_CX_SERVIC<br>E_REQUEST_ANA<br>LYSIS_OAC_CONT<br>ENT_DUTY<br><br>OA4F_CX_SERVIC<br>E_REQUEST_LIFE<br>CYCLE_ANALYSIS<br>_OAC_CONTENT_<br>DUTY<br><br>OA4F_CX_SERVIC<br>E_REQUEST_MIL<br>ESTONE_ANALYSI<br>S_OAC_CONTENT<br>_DUTY | CX Service      |

| Job-Specific Group Code             | Job-Specific Group Name | Description                        | Associated Application Roles                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | Functional Area |
|-------------------------------------|-------------------------|------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------|
| ORA_OSS_SUBSCRIPTION_SPECIALIST_JOB | Subscription Specialist | Subscription Specialist Job Groups | OA4F_CX_SUBSCRIPTIONS_ANALYSIS_DUTY<br>OA4F_CX_SUBSCRIPTION_CUSTOM_DATA<br>OA4F_CX_SUBSCRIPTION_BILL_LINE_ANALYSIS_DUTY<br>OA4F_CX_SUBSCRIPTION_HISTORICAL_TREND_ANALYSIS_DUTY<br>OA4F_CX_SUBSCRIPTIONS_ANALYSIS_CONTENT_DUTY<br>OA4F_CX_SUBSCRIPTION_BILL_LINE_ANALYSIS_CONTENT_DUTY<br>OA4F_CX_SUBSCRIPTION_HISTORICAL_TREND_ANALYSIS_CONTENT_DUTY<br>OA4F_CX_SUBSCRIPTIONS_ANALYSIS_OAC_CONTENT_DUTY<br>OA4F_CX_SUBSCRIPTION_HISTORICAL_TREND_ANALYSIS_OAC_CONTENT_DUTY<br>OA4F_CX_SUBSCRIPTION_BILL_LINE_ANALYSIS_OAC_CONTENT_DUTY<br>OA4F_CX_SUBSCRIPTION_CUSTOM_DATA<br>OA4F_CX_SUBSCRIPTION_BUSINESS_UNIT_DATA | CX Subscription |

| Job-Specific Group Code    | Job-Specific Group Name | Description       | Associated Application Roles                                                                                                                                                        | Functional Area              |
|----------------------------|-------------------------|-------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------|
| ORA_ELQ_MARKETING_USER_JOB | CX Marketing User       | CX Marketing User | OA4F_CX_CAMPAIGN_ACTIVITY_ANALYSIS_DUTY<br>OA4F_CX_CAMPAIGN_ACTIVITY_DETAILED_ANALYSIS_DUTY<br>OA4F_CX_CAMPAIGN_ACTIVITY_CONTENT_DUTY<br>OA4F_CX_CAMPAIGN_ACTIVITY_OAC_CONTENT_DUTY | Marketing Campaign Analytics |

| Job-Specific Group Code | Job-Specific Group Name | Description           | Associated Application Roles                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | Functional Area         |
|-------------------------|-------------------------|-----------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------|
| ORA_SFA_SALES_USER_JOB  | Salesforce Sales User   | Salesforce Sales User | OA4F_SF_OPPORTUNITY_ANALYSIS_DUTY<br>OA4F_SF_OPPORTUNITY_LINE_ITEM_ANALYSIS_DUTY<br>OA4F_SF_ACTIVITY_ANALYSIS_DUTY<br>OA4F_SF_OPPORTUNITY_ACTIVITY_ANALYSIS_DUTY<br>OA4F_SF_LEADS_ANALYSIS_DUTY<br>OA4F_SF_LEADS_ACTIVITY_ANALYSIS_DUTY<br>OA4F_SF_CAMPaign_INFLUENCE_ANALYSIS_DUTY<br>OA4F_SF_CAMPaign_PRIMARY_INFLUENCE_ANALYSIS_DUTY<br>OA4F_SF_CAMPaign_MEMBER_ANALYSIS_DUTY<br>OA4F_SF_OPPORTUNITY_STAGE_PROGRESSION_ANALYSIS_DUTY<br>OA4F_SF_OPPORTUNITY_HISTORICAL_TREND_ANALYSIS_DUTY<br>OA4F_SF_OPPORTUNITY_CHANGE_ANALYSIS_DUTY<br>OA4F_SF_OPPORTUNITY_CONTENT_ANALYSIS_DUTY<br>OA4F_SF_OPPORTUNITY_OAC_CONTENT_ANALYSIS_DUTY<br>OA4F_SF_OPPORTUNITY_LINE_ITEM_OAC_CONTENT_ANALYSIS_DUTY<br>OA4F_SF_OPPORTUNITY_LINE_ITEM | Salesforce CRM Pipeline |

| Job-Specific Group Code | Job-Specific Group Name | Description | Associated Application Roles                                                                                                                                                                                                                                                              | Functional Area |
|-------------------------|-------------------------|-------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------|
|                         |                         |             | M_CONTENT_ANALYSIS_DUTY<br>OA4F_SF_OPPORTUNITY_STAGE_PROGRESSION_OAC_CONTENT_ANALYSIS_DUTY<br>OA4F_SF_OPPORTUNITY_STAGE_PROGRESSION_CONTENT_ANALYSIS_DUTY<br>OA4F_SF_OPPORTUNITY_HISTORICAL_TREND_OAC_CONTENT_ANALYSIS_DUTY<br>OA4F_SF_OPPORTUNITY_HISTORICAL_TREND_CONTENT_ANALYSIS_DUTY |                 |

## Common Job-Specific Groups

The common job-specific groups are applicable across the analytics applications that are part of Oracle Fusion Data Intelligence 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_INTEGRATION_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<br>OA4F_COMMON_DATA_ADMIN_ANALYSIS_DUTY | Not applicable                    | Common          |

## Data Roles

### Overview

This section provides data roles that can be used to secure access to the subject area.

| 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        |
| OA4F_CX_SUBSCRIPTION_BUSINESS_UNIT_DATA     | Subscription Business Unit Data Security                       | Data Security role to access Subscription Business Unit based data                   | CX Subscription |
| OA4F_CX_SUBSCRIPTION_CUSTOM_DATA            | Subscription Custom and System Access Group Data Security      | Data Security role to access Subscription data by Access group data                  | CX Subscription |

## Duty Roles

## Overview

This section provides subject area and content-related duty roles that you can use to secure access to the subject areas and specific content. For each duty role in this section, links are provided for detailed information about the job-specific groups, subject areas, and business questions associated with the 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_CAMPA<br>IGN_ACTIVITY_AN<br>ALYSIS_CONTENT<br>_DUTY                | Campaign Activity<br>Analysis Content<br>Duty            | Controls presentation catalog access to DV projects and business metrics built against the CX - Campaign Activity Analysis subject area.                                       | CX - Marketing  | NA                                                          |
| OA4F_CX_CAMPA<br>IGN_ACTIVITY_AN<br>ALYSIS_DUTY                            | Campaign Activity<br>Analysis Duty                       | Controls presentation catalog access to CX - Campaign Activity Analysis subject area.                                                                                          | CX - Marketing  | CX - Campaign Activity Analysis                             |
| OA4F_CX_CAMPA<br>IGN_ACTIVITY_DE<br>TAIL_ANALYSIS_D<br>UTY                 | Campaign Activity<br>Detail Analysis<br>Duty             | Object security role to control presentation catalog access to "CX - Campaign Activity Detail Analysis" subject area.                                                          | CX - Marketing  | CX - Campaign Activity Detail Analysis                      |
| OA4F_CX_CAMPA<br>IGN_ACTIVITY_DE<br>TAIL_ANALYSIS_O<br>AC_CONTENT_DU<br>TY | Campaign Activity<br>Detail Analysis<br>OAC Content Duty | Object security role to control presentation catalog access to business metrics and Overview dashboards built against the CX - Campaign Activity Detail Analysis subject area. | CX - Marketing  | NA                                                          |
| OA4F_CX_CAMPA<br>IGN_MEMBERS_C<br>ONTENT_DUTY                              | Campaign Member<br>Analysis Content<br>Duty              | Controls presentation catalog access to DV projects and business metrics built against the CX - Campaign Members subject area.                                                 | CX-Sales        | NA                                                          |

| Duty Role Code                                                          | Duty Role Name                                                      | Duty Role Description                                                                                                                                                               | Functional Area | Gets access to Subject Area Display Name OR Associated Role |
|-------------------------------------------------------------------------|---------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------|-------------------------------------------------------------|
| OA4F_CX_CAMPA<br>IGN_MEMBERS_D<br>UTY                                   | Campaign<br>Members Analysis<br>Duty                                | Controls<br>presentation<br>catalog access to<br>CX - Campaign<br>Members subject<br>area.                                                                                          | CX - Sales      | CX - Campaign<br>Members                                    |
| OA4F_CX_CAMPA<br>IGN_OPTY_REVE<br>NUE_ANALYSIS_C<br>ONTENT_DUTY         | Campaign<br>Opportunity<br>Revenue Analysis<br>Content Duty         | Controls<br>presentation<br>catalog access to<br>DV projects and<br>business metrics<br>built against the CX<br>- Campaign<br>Opportunity<br>Revenue subject<br>area.               | CX-Sales        | NA                                                          |
| OA4F_CX_CAMPA<br>IGN_OPTY_REVE<br>NUE_ANALYSIS_D<br>UTY                 | Campaign<br>Opportunity<br>Revenue Analysis<br>Duty                 | Controls<br>presentation<br>catalog access to<br>CX - Campaign<br>Opportunity<br>Revenue subject<br>area.                                                                           | CX-Sales        | CX - Campaign<br>Opportunity<br>Revenue                     |
| OA4F_CX_CAMPA<br>IGN_OPTY_REVE<br>NUE_ANALYSIS_O<br>AC_CONTENT_DU<br>TY | Campaign<br>Opportunity<br>Revenue Analysis<br>OAC Content Duty     | Controls<br>presentation<br>catalog access to<br>business metric<br>Overview<br>Dashboards built<br>against the CX -<br>Campaign<br>Opportunity<br>Revenue Analysis<br>subject area | CX-Sales        | NA                                                          |
| OA4F_CX_CAMPA<br>IGN_OPTY_REVN<br>_CONTENT_DUTY                         | Campaign<br>Opportunity<br>Revenue Line<br>Analysis Content<br>Duty | Controls<br>presentation<br>catalog access to<br>DV projects and<br>business metrics<br>built against the CX<br>- Campaign<br>Opportunity<br>Revenue Line<br>subject area.          | CX-Sales        | NA                                                          |
| OA4F_CX_LEADS<br>_CONTENT_DUTY                                          | Lead Analysis<br>Content Duty                                       | Controls<br>presentation<br>catalog access to<br>DV projects and<br>business metrics<br>built against the CX<br>- Leads subject<br>area.                                            | CX-Sales        | NA                                                          |

| Duty Role Code                          | Duty Role Name                             | Duty Role Description                                                                                                                       | Functional Area | Gets access to Subject Area Display Name OR Associated Role |
|-----------------------------------------|--------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------|-----------------|-------------------------------------------------------------|
| OA4F_CX_LEADS_DUTY                      | Lead Analysis Duty                         | Controls presentation catalog access to CX - Leads subject area.                                                                            | CX - Sales      | CX - Leads                                                  |
| OA4F_CX_OPTY_ANALYSIS_CONTENT_DUTY      | Opportunity Analysis Content Duty          | Controls presentation catalog access to DV projects and business metrics built against the CX - Opportunity subject area.                   | CX-Sales        | NA                                                          |
| OA4F_CX_OPTY_ANALYSIS_DUTY              | Opportunity Analysis Duty                  | Controls presentation catalog access to CX - Opportunity subject area.                                                                      | CX - Sales      | CX - Opportunity                                            |
| OA4F_CX_OPTY_PROG_ANALYSIS_CONTENT_DUTY | Opportunity Stage Progression Content Duty | Controls presentation catalog access to DV projects and business metrics built against the CX - Opportunity Stage Progression subject area. | CX-Sales        | NA                                                          |
| OA4F_CX_OPTY_PROG_ANALYSIS_DUTY         | Opportunity Stage Progression Duty         | Controls presentation catalog access to CX - Opportunity Stage Progression subject area.                                                    | CX - Sales      | CX - Opportunity Stage Progression                          |
| OA4F_CX_OPTY_SNP_ANALYSIS_CONTENT_DUTY  | Opportunity Snapshot Content Duty          | Controls presentation catalog access to DV projects and business metrics built against the CX - Opportunity Snapshot subject area.          | CX-Sales        | NA                                                          |
| OA4F_CX_OPTY_SNP_ANALYSIS_DUTY          | Opportunity Snapshot Duty                  | Controls presentation catalog access to CX - Opportunity Revenue Line 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_REVN_LINE_ANALYSIS_CONTENT_DUTY     | Opportunity Revenue Analysis Content Duty      | Controls presentation catalog access to DV projects and business metrics built against the CX - Opportunity Revenue Line subject area.          | CX-Sales        | NA                                                          |
| OA4F_CX_REVN_LINE_ANALYSIS_DUTY             | Opportunity Revenue Analysis Duty              | Controls presentation catalog access to CX - Opportunity Revenue Line subject area.                                                             | CX - Sales      | CX - Opportunity Revenue Line                               |
| OA4F_CX_REVN_LINE_SNP_ANALYSIS_CONTENT_DUTY | Opportunity Revenue Line Snapshot Content Duty | Controls presentation catalog access to DV projects and business metrics built against the CX - Opportunity Revenue Line Snapshot subject area. | CX-Sales        | NA                                                          |
| OA4F_CX_REVN_LINE_SNP_ANALYSIS_DUTY         | Opportunity Revenue Line Snapshot Duty         | Controls presentation catalog access to CX - Opportunity Revenue Line Snapshot subject area.                                                    | CX - Sales      | CX - Opportunity Revenue Line Snapshot                      |
| OA4F_CX_SALES_ACTIVITY_CONTENT_DUTY         | Sales Activity Analysis Content Duty           | Controls presentation catalog access to DV projects and business metrics built against the CX - Activity subject area.                          | CX-Sales        | NA                                                          |
| OA4F_CX_SALES_ACTIVITY_DUTY                 | Sales Activity Analysis Duty                   | Controls presentation catalog access to CX - Activity subject area.                                                                             | CX - Sales      | CX - Activity                                               |
| OA4F_CX_SALES_LEAD_ACTIVITY_CONTENT_DUTY    | Lead Activity Analysis Content Duty            | Controls presentation catalog access to DV projects and business metrics built against the CX - Lead Activity subject area.                     | CX-Sales        | NA                                                          |

| Duty Role Code                                      | Duty Role Name                                   | Duty Role Description                                                                                                                | Functional Area | Gets access to Subject Area Display Name OR Associated Role |
|-----------------------------------------------------|--------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------|-----------------|-------------------------------------------------------------|
| OA4F_CX_SALES_LEAD_ACTIVITY_DUTY                    | Lead Activity Analysis Duty                      | Controls presentation catalog access to CX - Lead Activity subject area.                                                             | CX - Sales      | CX - Lead Activity                                          |
| OA4F_CX_SALES_OPPORTUNITY_ACTIVITY_CONTENT_DUTY     | Sales Opportunity Activity Analysis Content Duty | Controls presentation catalog access to DV projects and business metrics built against the CX - Opportunity Activity subject area.   | CX-Sales        | NA                                                          |
| OA4F_CX_SALES_OPPORTUNITY_ACTIVITY_DUTY             | Sales Opportunity Activity Analysis Duty         | Controls presentation catalog access to CX - Opportunity Activity subject area.                                                      | CX - Sales      | CX - Opportunity Activity                                   |
| OA4F_CX_SALES_OPTY_QUOTE_LINE_ANALYSIS_CONTENT_DUTY | Opportunity Quote Line Analysis Content Duty     | Controls presentation catalog access to DV projects and business metrics built against the CX - Opportunity Quote Line subject area. | CX-Sales        | NA                                                          |
| OA4F_CX_SALES_OPTY_QUOTE_ANALYSIS_CONTENT_DUTY      | Opportunity Quote Analysis Content Duty          | Controls presentation catalog access to DV projects and business metrics built against the CX - Opportunity Quote subject area.      | CX-Sales        | NA                                                          |
| OA4F_CX_SALES_OPTY_QUOTE_ANALYSIS_DUTY              | Opportunity Quote Analysis Duty                  | Controls presentation catalog access to CX - Opportunity Quote subject area.                                                         | CX-Sales        | CX - Opportunity Quote                                      |
| OA4F_CX_SALES_OPTY_QUOTE_LINE_ANALYSIS_DUTY         | Opportunity Quote Line Analysis Duty             | Controls presentation catalog access to CX - Opportunity Quote Line subject area.                                                    | CX-Sales        | CX - Opportunity Quote Line                                 |

| Duty Role Code                                          | Duty Role Name                                  | Duty Role Description                                                                                                                   | Functional Area   | Gets access to Subject Area Display Name OR Associated Role |
|---------------------------------------------------------|-------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------|-------------------|-------------------------------------------------------------|
| OA4F_CX_SERVICE_REQUEST_ANALYSIS_CONTENT_DUTY           | Service Request Analysis Content Duty           | Controls presentation catalog access to DV projects and business metrics built against the CX - Service Request subject area.           | CX-Sales          | NA                                                          |
| OA4F_CX_SERVICE_REQUEST_ANALYSIS_DUTY                   | Service requests Analysis Duty                  | Controls presentation catalog access to CX - B2B Service Requests subject area.                                                         | CX - Service      | CX - Service Request                                        |
| OA4F_CX_SERVICE_REQUEST_LIFECYCLE_ANALYSIS_CONTENT_DUTY | Service Request Lifecycle Analysis Content Duty | Controls presentation catalog access to DV projects and business metrics built against the CX - Service Request Lifecycle subject area. | CX - Service      | NA                                                          |
| OA4F_CX_SERVICE_REQUEST_MILESTONE_ANALYSIS_CONTENT_DUTY | Service Request Milestone Analysis Content Duty | Controls presentation catalog access to DV projects and business metrics built against the CX - Service Request Milestone subject area. | CX - Service      | NA                                                          |
| OA4F_CX_SUBSCRIPTION_BILL_LINE_ANALYSIS_CONTENT_DUTY    | Subscription Bill Line Analysis Content Duty    | Controls presentation catalog access to DV projects and business metrics built against the CX - Subscription Bill Line subject area.    | CX - Subscription | NA                                                          |
| OA4F_CX_SUBSCRIPTION_BILL_LINE_ANALYSIS_DUTY            | Subscription Bill Line Analysis Duty            | Controls presentation catalog access to CX - Subscription Bill Line subject area.                                                       | CX - Subscription | CX - Subscription Bill Line                                 |

| Duty Role Code                                                            | Duty Role Name                                               | Duty Role Description                                                                                                                                               | Functional Area                                 | Gets access to Subject Area Display Name OR Associated Role |
|---------------------------------------------------------------------------|--------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------|-------------------------------------------------------------|
| OA4F_CX_SUBCR<br>PTION_HISTORIC<br>AL_TREND_ANAL<br>YSIS_CONTENT_<br>DUTY | Subscription<br>Historical Trend<br>Analysis Content<br>Duty | Controls<br>presentation<br>catalog access to<br>DV projects and<br>business metrics<br>built against the CX<br>- Subscription<br>Historical Trend<br>subject area. | CX - Subscription                               | NA                                                          |
| OA4F_CX_SUBCR<br>PTION_HISTORIC<br>AL_TREND_ANAL<br>YSIS_DUTY             | Subscription<br>Historical Trend<br>Analysis Duty            | Controls<br>presentation<br>catalog access to<br>CX - Subscription<br>Historical Trend<br>subject area.                                                             | CX - Subscription                               | CX - Subscription<br>Historical Trend                       |
| OA4F_CX_SUBCR<br>PTIONS_ANALYSI<br>S_CONTENT_DUT<br>Y                     | Subscription<br>Analysis Content<br>Duty                     | Controls<br>presentation<br>catalog access to<br>DV projects and<br>business metrics<br>built against the CX<br>- Subscriptions<br>subject area.                    | CX - Subscription                               | NA                                                          |
| OA4F_CX_SUBCR<br>PTIONS_ANALYSI<br>S_DUTY                                 | Subscription<br>Analysis Duty                                | Controls<br>presentation<br>catalog access to<br>CX - Subscriptions<br>subject area.                                                                                | CX - Subscription                               | CX - Subscription                                           |
| OA4F_SF_ACTIVIT<br>Y_ANALYSIS_DUT<br>Y                                    | Salesforce Activity<br>Analysis Duty                         | Object security role<br>to control<br>presentation<br>catalog access to<br>SF - Activity subject<br>area.                                                           | Salesforce CRM<br>Pipeline                      | SF - Activity                                               |
| OA4F_SF_CAMP<br>GN_INFLUENCE_<br>ANALYSIS_DUTY                            | Salesforce<br>Campaign<br>Influence Analysis<br>Duty         | Object security role<br>to control<br>presentation<br>catalog access to<br>SF - Campaign<br>Influence subject<br>area.                                              | Salesforce<br>Campaign Closed<br>Loop Analytics | SF - Campaign<br>Influence                                  |
| OA4F_SF_CAMP<br>GN_MEMBER_AN<br>ALYSIS_DUTY                               | Salesforce<br>Campaign Member<br>Analysis Duty               | Object security role<br>to control<br>presentation<br>catalog access to<br>SF - Campaign<br>Member subject<br>area.                                                 | Salesforce<br>Campaign Closed<br>Loop Analytics | SF - Campaign<br>Members                                    |

| Duty Role Code                                                 | Duty Role Name                                                 | Duty Role Description                                                                                                                                                           | Functional Area                                 | Gets access to Subject Area Display Name OR Associated Role |
|----------------------------------------------------------------|----------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------|-------------------------------------------------------------|
| OA4F_SF_CAMP<br>IGN_PRIMARY_INF<br>LUENCE_ANALYSI<br>S_DUTY    | Salesforce Primary<br>Campaign<br>Influence Analysis<br>Duty   | Object security role<br>to control<br>presentation<br>catalog access to<br>SF - Primary<br>Campaign<br>Influence subject<br>area.                                               | Salesforce<br>Campaign Closed<br>Loop Analytics | SF - Primary<br>Campaign<br>Influence                       |
| OA4F_SF_LEADS<br>_ACTIVITY_ANALY<br>SIS_DUTY                   | Salesforce Lead<br>Activity Analysis<br>Duty                   | Object security role<br>to control<br>presentation<br>catalog access to<br>SF - Lead Activity<br>subject area.                                                                  | Salesforce CRM<br>Pipeline                      | SF - Lead Activity                                          |
| OA4F_SF_LEADS<br>_ANALYSIS_CONT<br>ENT_DUTY                    | Salesforce Lead<br>Analysis Content<br>Duty                    | Object security role<br>to control<br>presentation<br>catalog access to<br>visualization<br>projects and<br>business metrics<br>built against the SF<br>- Lead subject<br>area. | Salesforce CRM<br>Pipeline                      | NA                                                          |
| OA4F_SF_LEADS<br>_ANALYSIS_DUTY                                | Salesforce Leads<br>Analysis Duty                              | Object security role<br>to control<br>presentation<br>catalog access to<br>SF - Leads subject<br>area.                                                                          | Salesforce CRM<br>Pipeline                      | SF - Leads                                                  |
| OA4F_SF_OPPOR<br>TUNITY_ANALYSI<br>S_DUTY                      | Salesforce<br>Opportunity<br>Analysis Duty                     | Object security role<br>to control<br>presentation<br>catalog access to<br>SF - Opportunity<br>subject area.                                                                    | Salesforce CRM<br>Pipeline                      | SF - Opportunity                                            |
| OA4F_SF_OPPOR<br>TUNITY_CONTEN<br>T_ANALYSIS_DUT<br>Y          | Salesforce<br>Opportunity Activity<br>Analysis Duty            | Object security role<br>to control<br>presentation<br>catalog access to<br>SF - Opportunity<br>Activity subject<br>area.                                                        | Salesforce CRM<br>Pipeline                      | SF - Opportunity<br>Activity                                |
| OA4F_SF_OPPOR<br>TUNITY_HISTORI<br>CAL_TREND_ANA<br>LYSIS_DUTY | Salesforce<br>Opportunity<br>Historical Trend<br>Analysis Duty | Object security role<br>to control<br>presentation<br>catalog access to<br>SF - Opportunity<br>Historical Trend<br>subject area.                                                | Salesforce CRM<br>Pipeline                      | SF - Opportunity<br>Historical Trend                        |

| Duty Role Code                                                 | Duty Role Name                                                    | Duty Role Description                                                                                                                                                        | Functional Area                           | Gets access to Subject Area Display Name OR Associated Role |
|----------------------------------------------------------------|-------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------|-------------------------------------------------------------|
| OA4F_SF_OPPORTUNITY_HISTORICAL_TREND_ANALYSIS_OAC_CONTENT_DUTY | Salesforce Opportunity Historical Trend Analysis OAC Content Duty | Object security role to control presentation catalog access to business metrics and Overview dashboards built against the SF - Opportunity Historical Trend subject area.    | Salesforce Campaign Closed Loop Analytics | NA                                                          |
| OA4F_SF_OPPORTUNITY_HISTORICAL_TREND_CONTENT_ANALYSIS_DUTY     | Salesforce Opportunity Historical Trend Content Analysis Duty     | Object security role to control presentation catalog access to visualization projects and business metrics built against the SF - Opportunity Historical Trend subject area. | Salesforce CRM Pipeline                   | NA                                                          |
| OA4F_SF_OPPORTUNITY_LINE_ITEM_ANALYSIS_DUTY                    | Salesforce Opportunity Line Item Analysis Duty                    | Object security role to control presentation catalog access to SF - Opportunity Line Item subject area.                                                                      | Salesforce CRM Pipeline                   | SF - Opportunity Line Item                                  |
| OA4F_SF_OPPORTUNITY_LINE_ITEM_CONTENT_ANALYSIS_DUTY            | Salesforce Opportunity Line Item Content Analysis Duty            | Object security role to control presentation catalog access to visualization projects and business metrics built against the SF - Opportunity Line Item subject area.        | Salesforce CRM Pipeline                   | NA                                                          |
| OA4F_SF_OPPORTUNITY_LINE_ITEM_OAC_CONTENT_ANALYSIS_DUTY        | Salesforce Opportunity Line Item Analysis OAC Content Duty        | Object security role to control presentation catalog access to business metrics and Overview dashboards built against the SF - Opportunity Line Item subject area.           | Salesforce CRM Pipeline                   | NA                                                          |

| Duty Role Code                                                  | Duty Role Name                                                     | Duty Role Description                                                                                                                                                         | Functional Area         | Gets access to Subject Area Display Name OR Associated Role |
|-----------------------------------------------------------------|--------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------|-------------------------------------------------------------|
| OA4F_SF_OPPORTUNITY_OAC_CONTENT_ANALYSIS_DUTY                   | Salesforce Opportunity Analysis OAC Content Duty                   | Object security role to control presentation catalog access to KPIs and Overview dashboards built against the SF - Opportunity subject area.                                  | Salesforce CRM Pipeline | SF - Opportunity Stage Progression                          |
| OA4F_SF_OPPORTUNITY_STAGE_PROGRESSION_ANALYSIS_CONTENT_DUTY     | Salesforce Opportunity Stage Progression Content Analysis Duty     | Object security role to control presentation catalog access to visualization projects and business metrics built against the SF - Opportunity Stage Progression subject area. | Salesforce CRM Pipeline | NA                                                          |
| OA4F_SF_OPPORTUNITY_STAGE_PROGRESSION_ANALYSIS_DUTY             | Salesforce Opportunity Stage Progression Analysis Duty             | Object security role to control presentation catalog access to SF - Opportunity Stage Progression subject area.                                                               | Salesforce CRM Pipeline | SF - Opportunity Stage Progression                          |
| OA4F_SF_OPPORTUNITY_STAGE_PROGRESSION_ANALYSIS_OAC_CONTENT_DUTY | Salesforce Opportunity Stage Progression Analysis OAC Content Duty | Object security role to control presentation catalog access to business metrics and Overview dashboards built against the SF - Opportunity Stage Progression subject area.    | Salesforce CRM Pipeline | NA                                                          |
| OA4F_SF_OPPORTUNITY_STAGE_PROGRESSION_CONTENT_ANALYSIS_DUTY     | Salesforce Opportunity Stage Progression Content Analysis Duty     | Object security role to control presentation catalog access to DV projects and KPIs built against the SF - Opportunity Stage Progression subject area.                        | Salesforce CRM Pipeline | NA                                                          |

## Common Duty Roles

The common duty roles are applicable across the analytics applications that are part of the application such as Oracle Fusion CX Analytics, 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_ANALYSIS_DUTY              | Data Warehouse Refresh and Usage Tracking Analysis Duty         | Object security role to control access to Common - Warehouse Refresh Statistics subject area.           | Common          | Common - Warehouse Refresh Statistics                       |
| OA4F_COMMON_DATA_ADMIN_ANALYSIS_CONTENT_DUTY      | Data Warehouse Refresh and Usage Tracking Analysis Content Duty | Object security role to control access to Warehouse Refresh Statistics and Data Validation workbooks.   | Common          |                                                             |
| 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                                     |
| OA4F_COMMON_USAGE_TRACKING_CONTENT_DUTY           | Usage Tracking Analysis Content Duty                            | Object security role to control presentation catalog access to Usage Tracking workbook                  | Common          |                                                             |
| OA4F_SECURITY_REPORTING_DUTY                      | Security Reporting Duty                                         | Object security role to control access to Security Assignment and Security Audit History subject areas. | Common          | Security Assignment<br>Security Audit History               |
| OA4F_STORAGE_USAGE_TRACKING_ANALYSIS_DUTY         | Storage Usage Tracking Analysis Duty                            | Object security role to control access to the Tenant Metrics subject area                               | Common          |                                                             |
| OA4F_STORAGE_USAGE_TRACKING_ANALYSIS_CONTENT_DUTY | Storage Usage Tracking Analysis Content Duty                    | Object security role to control presentation catalog access to Custom Data Usage workbook               | Common          |                                                             |

| Duty Role Code                              | Duty Role Name                 | Details                                                                                                                 | Functional Area | Gets access to Subject Area Display Name OR Associated Role |
|---------------------------------------------|--------------------------------|-------------------------------------------------------------------------------------------------------------------------|-----------------|-------------------------------------------------------------|
| OA4F_CONTENT_EXPLORER_ANALYSIS_DUTY         | Content Explorer Analysis Duty | Object security role to control access to the Content Explorer subject areas                                            | Common          |                                                             |
| OA4F_CONTENT_EXPLORER_ANALYSIS_CONTENT_DUTY | Content Explorer Content Duty  | Object security role to control presentation catalog access to the Content Explorer - Fusion Data Intelligence workbook | Common          |                                                             |

## Subject Area Metric Details

### CX - Activity

This table describes the Activity Metrics.

| Metric                                             | Metric Definition                                                                                              |
|----------------------------------------------------|----------------------------------------------------------------------------------------------------------------|
| # of Activities                                    | The total Activities                                                                                           |
| # of Appointments                                  | The total Appointments (Activity function = Appointments)                                                      |
| # of Call Reports                                  | The total Call Reports (Activity function = Call Reports)                                                      |
| # 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 Open Activities                               | The total Open Activities (Status not equal to Complete/Cancelled)                                             |
| # of Tasks                                         | The total Tasks (Activity function = Task)                                                                     |
| 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 Bouncebacks         | The total Emails that returned a Bounceback (hard or soft)                                                                      |
| # of Email Clickthroughs | The total Email Clickthroughs. This includes multiple clicks by the same recipient                                              |
| # of Email Opens         | The total opens by email recipients (original recipients or email forwards). An open is counted every time the email is opened. |

| Metric                              | Metric Definition                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|-------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| # of Emails Delivered               | The total Emails Delivered. This metric is computed as follow: (# of Email Sent - # of Email Bounceback)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| # of Emails Sent                    | The total Emails Sent                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| # of Existing Visitor Clickthroughs | Total Email Clickthroughs by returning visitors. A returning visitor has an existing Oracle Eloqua cookie. The cookie is unique to the browser and device.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| # of Form Submissions               | The total Form submissions. This includes multiple submissions by the same contact                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| # 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 Landing Page Views             | The number of times the landing page was viewed. If a visitor visits the page multiple times, all those views are counted.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| # of New Contacts                   | The total new Contacts. A contact is considered new if the contact record was created as a result of a campaign response. Your organization defines what a response is and the priority of the response using response rules.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| # 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. Your organization defines what a response is and the priority of the response using response rules.                                                                                                                                                                                                                                                                                                    |
| # of New Visitor Clickthroughs      | Total email clickthroughs by new visitors. An new visitor does not have an Oracle Eloqua cookie. The cookie is unique to the browser and device.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| # of Page Views                     | The number of times that a page was viewed. A visitor might view the page multiple times during a visit and this metric counts each of those views. One page view is counted every time the page is loaded.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| # of Possible Forwarders            | The total original recipients that forwarded the email atleast once                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| # of Responses                      | The total response activity for the campaign. Your organization defines what a response is and the priority of the response using response rules. Although a campaign member might respond in many ways to a campaign (for example, clicking through an email or submitting a form), Oracle Eloqua records only the response deemed by your organization as the highest priority response. For example, a form submit at your organization might be considered a higher priority response than an email click-through. So, even if a contact performed both of these responses, Oracle Eloqua records the form submit as a response to the campaign. Responses are captured for a campaign only after the campaign's reporting start date. |
| # 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 Spam Unsubscribers by Email    | The total Email recipients that marked the email as Spam                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| # of Unsubscribes by Email          | The total Email recipients that Unsubscribed. (Globally or Spam Unsubscribed)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |

| Metric                    | Metric Definition                                                                                                                                                                                                                                                                                                                                                                                     |
|---------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| # of Visitors             | The unique visitors to a web page. A visitor is identified by the unique visitor identifier that is part of the Oracle Eloqua cookie. The cookie is unique to the browser and device.                                                                                                                                                                                                                 |
| Average Landing Page Time | The average amount of time spent on a Landing page. This metric is computed as follows: (Landing Page Time / Landing Page Views)                                                                                                                                                                                                                                                                      |
| Average Responses         | The average number of campaign responses (Total Response / Campaign Count)                                                                                                                                                                                                                                                                                                                            |
| Bounceback Rates          | The Email Bounceback rate. This metric is computed as follows: (Total Soft and Hard bouncebacks / Total Emails sent) * 100                                                                                                                                                                                                                                                                            |
| Clickthrough Rate (CTR)   | The Clickthrough Rate. This metric is computed as follows: (Total Clickthroughs / Total Emails Delivered) * 100                                                                                                                                                                                                                                                                                       |
| Delivered Rate            | The email Delivered Rate. This metric is computed as follows: (Total Emails delivered / Total Emails sent) * 100                                                                                                                                                                                                                                                                                      |
| Hard Bounceback Rate      | The Hard Bounceback rate. This metric is computed as follows: (Total Hard bouncebacks / Total Emails sent) * 100                                                                                                                                                                                                                                                                                      |
| Landing Page Time         | The total amount of time visitors spent on a Landing Page in seconds                                                                                                                                                                                                                                                                                                                                  |
| Open Rate                 | The Email Open Rate. This metric is computed as follows: (Total Emails Opened / Total Emails Delivered) * 100                                                                                                                                                                                                                                                                                         |
| Possible Forward Rate     | The Possible Forward Rate. This metric is computed as follows: (Total Possible Forwarders / Total Emails Delivered) * 100                                                                                                                                                                                                                                                                             |
| Soft Bounceback Rate      | The Soft Bounceback rate. This metric is computed as follows: (Total Soft bouncebacks/Total Emails sent) * 100                                                                                                                                                                                                                                                                                        |
| Unsubscribed Rate         | The Unsubscribe Rate. This metric is computed as follows: (Total Unsubscribes / Total Emails Delivered) * 100                                                                                                                                                                                                                                                                                         |
| # of Outbound Activities  | The amount of Outbound Activity. Outbound activities include emails sent, emails delivered, and surveys sent. This counts all of the activity including multiple activities by the same campaign member. An outbound activity can be generated by a contact that was initially targeted by the campaign or by a contact that performed an outbound activity (for example, via a forwarded email).     |
| # of Inbound Activities   | The amount of Inbound Activity. Inbound activities include email opens, clickthroughs, form submissions, and so on. This counts all of the activity including multiple activities by the same campaign member. An inbound activity can be generated by a contact that was initially targeted by the campaign or by a contact that performed an inbound activity (for example, via a forwarded email). |
| # of Marketing Activities | Total number of activities (total outbound+inbound)                                                                                                                                                                                                                                                                                                                                                   |
| # of Campaign Members     | The total contacts that entered campaigns included in the analysis. Campaign members could be contacts that were initially targeted by the campaign, or contacts that performed an inbound activity (for example, a contact that clicked through an email that was forwarded to them).                                                                                                                |
| # of Campaigns            | The total Campaigns included in the Analysis                                                                                                                                                                                                                                                                                                                                                          |
| # of External Activities  | The activity that occurred outside of Oracle Eloqua. For example, attending a trade show, or interacting with an app such as WeChat. Your organization defines external activities.                                                                                                                                                                                                                   |

| Metric                          | Metric Definition                                                                                                                                                                                                                                            |
|---------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Inbound Activity Rate           | The total inbound activities divided by the total Campaign member (Total Inbound Activities/Campaign Members)*100                                                                                                                                            |
| Response Rate                   | The total campaign responses divided by the total campaign member (Total Responses/Campaign Members)*100                                                                                                                                                     |
| Cost/Inbound Activity           | The total Campaign Cost per Inbound Activity. This metric is calculated as follows: Campaign Actual Cost/# of Inbound Activities                                                                                                                             |
| Cost/New Lead                   | The total Campaign Cost per New Lead. This metric is calculated as follows: Campaign Actual Cost/# of New Leads                                                                                                                                              |
| Cost/Response                   | The total Campaign Cost per Response. This metric is calculated as follows: Campaign Actual Cost/# of Response                                                                                                                                               |
| Average Responses               | The average number of campaign responses (Total Response/Campaign Count)                                                                                                                                                                                     |
| Click to Open Rate              | The Click to Open Rate. It is the unique clickthroughs by the original recipient divided by the unique opens by the original recipient. This metric ignores possible forwards. This metric is computed as follows: (Unique Clickthroughs/Unique Opens) * 100 |
| Form Conversion Rate from Email | The total Form Submissions that can be attributed back to the Email Sent is divided by the total Email Delivered. This metric is computed as follows: (Total Form Submissions from Emails Sent/Total Emails Delivered)                                       |

## CX - Campaign Activity Detail Analysis

This table describes the Marketing (Eloqua) Campaign Activity Detail Analysis metrics for the associated Contacts, Accounts, and Assets.

| Metric                          | Metric Definition                                                                                                               |
|---------------------------------|---------------------------------------------------------------------------------------------------------------------------------|
| # of Email Sent                 | The total Emails Sent                                                                                                           |
| # of Emails Delivered           | The total Emails Delivered. This metric is computed as follows: (# of Email Sent - # of Email Bounceback)                       |
| # of Email Opens                | The total opens by email recipients (original recipients or email forwards). An open is counted every time the email is opened. |
| # of Unique Opens               | The Unique Email Opens. One open is counted against each recipient that opens the email.                                        |
| # of Email Clickthroughs        | The total Email Clickthroughs. This includes multiple clicks by the same recipient.                                             |
| # of Unique Email Clickthroughs | The total Unique Email Clickthroughs. This includes one click per recipient.                                                    |
| # of Email Bounceback           | The total Emails that returned a Bounceback (hard or soft)                                                                      |
| # of Hard Email Bounceback      | The total Emails that returned a Hard Bounceback. A hard bounce back is an Email that permanently couldn't be delivered.        |
| # of Soft Email Bounceback      | The total Emails that returned a Soft Bounceback. A soft bounce back is an Email that temporarily couldn't be delivered.        |
| # of Email Unsubscribes         | The total Email recipients that Unsubscribed. (Globally or Spam Unsubscribed)                                                   |
| # of Form Submissions           | The total Form submissions. This includes multiple submissions by the same contact.                                             |

| Metric                          | Metric Definition                                                                                                                                                                     |
|---------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| # of External Activities        | The activity that occurred outside of Oracle Eloqua. For example, attending a trade show, or interacting with an app such as WeChat. Your organization defines external activities.   |
| Bounceback Rates                | The Email Bounceback rate. This metric is computed as follows: (Total Soft and Hard bouncebacks/Total Emails sent)*100                                                                |
| Hard Bounceback Rate            | The Hard Bounceback rate. This metric is computed as follows: (Total Hard bouncebacks/Total Emails sent)*100                                                                          |
| Soft Bounceback Rate            | The Soft Bounceback rate. This metric is computed as follows: (Total Soft bouncebacks/Total Emails sent)*100                                                                          |
| Delivered Rate                  | The email Delivered Rate. This metric is computed as follows: (Total Emails delivered/Total Emails sent)*100                                                                          |
| Open Rate                       | The Email Open Rate. This metric is computed as follows: (Total Emails Opened/Total Emails Delivered)*100                                                                             |
| Unique Open Rate                | The Unique Email Open Rate. This metric is computed as follows: (Total Unique Email Opened/Total Emails Delivered)*100                                                                |
| # of Spam Unsubscribes by Email | The total Email recipients that marked the email as Spam.                                                                                                                             |
| # of Email Auto Open            | The total Email opens are detected as being auto-generated by scanning or privacy tools. These opens aren't included in Total Opens or any associated open rates.                     |
| # of Email Auto Click           | The total Email clickthrough detected as being auto-generated by scanning or privacy tools. These clickthroughs aren't included in Total clickthroughs or any associated click rates. |
| Unsubscribed Rate               | The Email Unsubscribed Rate. This metric is computed as follows: (Total Unsubscribes / Total Delivered) * 100.                                                                        |
| Clickthrough Rate               | The Email clickthrough Rate. This metric is computed as follows: (Total Clickthroughs / Total Delivered) * 100.                                                                       |
| Unique Clickthrough Rate        | The Email unique clickthrough Rate. This metric is computed as follows: (Unique Clickthroughs / Total Delivered) * 100<br>Note: This metric calculation ignores possible forwards.    |
| Campaign Actual Cost            | The Actual Cost of the Campaign                                                                                                                                                       |
| Campaign Budgeted Cost          | The Budgeted Cost of the Campaign                                                                                                                                                     |

## CX - Campaign Members

This table describes the Campaign Members metrics.

These metrics are used in the Analytics Currency (AC) and Document Currency (DC) fact folder in the subject area. Document Currency is the currency used while entering the data. Analytics Currency is the currency defined in the application. Analytics Currency and Exchange Rate Type are configured during product implementation. The Exchange Rate date basis uses the Campaign Creation Date to convert to analytics currency. Metrics in these folders show amounts in their respective currencies.

| Metric                   | Metric Definition                             |
|--------------------------|-----------------------------------------------|
| # of Active CX Campaigns | The total Active CX Campaigns                 |
| # of Contacts            | The total Contacts associated to CX Campaigns |
| # of CX Campaign Members | The total CX Campaign Members                 |

| Metric                  | Metric Definition                          |
|-------------------------|--------------------------------------------|
| # of CX Campaign Owners | The total CX Campaign Owners               |
| # of CX Campaigns       | The total CX Campaigns                     |
| # of Leads              | The total Leads associated to CX Campaigns |
| # of Responses          | The total CX Campaign Responses            |
| Actual Cost             | The Actual Cost of the CX Campaign         |
| Budgeted Cost           | The Budgeted Cost of the CX Campaign       |

## CX - Campaign Opportunity Revenue

This table describes the Campaign Opportunity Revenue metrics.

These metrics are used in the Document Currency (DC), CX Currency (CC), and Analytics Currency (AC) fact folders in the subject area. Document Currency is the currency used while entering the data in the application. CX Currency is the currency defined in Oracle CRM. Analytics Currency is the currency defined in Fusion CX Analytics. Analytics Currency and Exchange Rate Type are configured during product implementation. Exchange Rate date basis uses the Opportunity Expected Close Date to convert to analytics currency. Metrics in these folders show amounts in their respective currencies.

| Metric                                  | Metric Definition                                                                                                                                                           |
|-----------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| # of CX Campaigns                       | The total CX Campaigns                                                                                                                                                      |
| # of CX Campaign Owners                 | The total CX Campaign Owners                                                                                                                                                |
| # CX Campaign Targeted Accounts         | The total Accounts associated to CX Campaigns (targeted by CX Campaigns)                                                                                                    |
| CX Campaign Budgeted Cost               | The Budgeted Cost of the CX Campaign                                                                                                                                        |
| CX Campaign Actual Cost                 | The Actual Cost of the CX Campaign                                                                                                                                          |
| # of Opportunity Revenue Lines          | The total Opportunity Revenue Lines associated to CX Campaigns                                                                                                              |
| # of Open Opportunity Revenue Lines     | The total Open Opportunity Revenue Lines associated to CX Campaigns                                                                                                         |
| # of Won Opportunity Revenue Lines      | The total Won Opportunity Revenue Lines associated to CX Campaigns                                                                                                          |
| # of Lost Opportunity Revenue Lines     | The total lost Opportunity Revenue Lines associated to CX Campaigns                                                                                                         |
| # of No Sale Opportunity Revenue Lines  | The total No Sale Opportunity Revenue Lines associated to CX Campaigns                                                                                                      |
| # of Opportunities with Revenue Lines   | The total Opportunities with Revenue Lines                                                                                                                                  |
| Revenue Line Loss Rate                  | The CX Campaign Opportunity Revenue Line Won Rate. This metric is computed as follows: $100 * \frac{\text{\# of Won Revenue Lines}}{\text{\# of Won+Lost Revenue Lines}}$   |
| Revenue Line Won Rate                   | The CX Campaign Opportunity Revenue Line Loss Rate. This metric is computed as follows: $100 * \frac{\text{\# of Lost Revenue Lines}}{\text{\# of Won+Lost Revenue Lines}}$ |
| CX Campaign Actual Vs Budgeted Cost (%) | The ratio of CX Campaign Actual and Budgeted cost. This metric is computed as follows: $\frac{\text{CX Campaign Actual Cost}}{\text{CX Campaign Budgeted Cost}}$            |
| Average Won Opportunity Line Revenue    | The average Won Opportunity Line Revenue. This metric is computed as follows: $\frac{\text{Won Opportunity Line Revenue}}{\text{\# of Won Opportunity Revenue Lines}}$      |

| Metric                                                       | Metric Definition                                                                                                                                                                                                                                   |
|--------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| CX Campaign Cost Per Opportunity Revenue Line                | The total CX Campaign Cost Per Opportunity Revenue Line. This metric is calculated as follows: Total CX Campaign Cost/# of Opportunity Revenue Lines.                                                                                               |
| CX Campaign Cost Per Won Opportunity Revenue Line            | The total CX Campaign Cost Per Won Opportunity Revenue Line. This metric is calculated as follows: Total CX Campaign Cost/# of Won Opportunity Revenue Lines.                                                                                       |
| Raw Opportunity Line Revenue                                 | The total Opportunity Line Revenue (for Opportunities associated to CX Campaigns). Note that for Opportunities having multiple CX Campaigns, this value would be repeated.                                                                          |
| Open Opportunity Line Revenue (Linear Attribution)           | The total Open Opportunity Line Revenue (for Opportunities associated to CX Campaigns) based on the Linear attribution model.                                                                                                                       |
| Won Opportunity Line Revenue (Linear Attribution)            | The total Won Opportunity Line Revenue (for Opportunities associated to CX Campaigns) based on the Linear attribution model.                                                                                                                        |
| Lost Opportunity Line Revenue (Linear Attribution)           | The total Lost Opportunity Line Revenue (for Opportunities associated to CX Campaigns) based on the Linear attribution model.                                                                                                                       |
| No Sales Opportunity Line Revenue (Linear Attribution)       | The total No Sale Opportunity Line Revenue (for Opportunities associated to CX Campaigns) based on the Linear attribution model.                                                                                                                    |
| Average Won Opportunity Line Revenue (Linear Attribution)    | The average Won Opportunity Line Revenue. This metric is computed as follows: Won Opportunity Line Revenue (Linear Attribution)/# of Won Opportunity Revenue Lines                                                                                  |
| CX Campaign Attributed Pipeline Revenue (Linear Attribution) | The total Pipeline revenue attributable to the CX Campaign based on the Linear attribution model (Revenue divided equally amongst all the CX Campaigns associated to the Opportunity)                                                               |
| CX Campaign ROI (Linear Attribution)                         | The ROI of the CX Campaign based on the Linear attribution model. This metric is calculated as follows: (CX Campaign Attributed Pipeline Revenue (Linear Attribution)- Actual Cost ) / Actual Cost                                                  |
| CX Campaign Cost Per Attributed Revenue (Linear Attribution) | The total CX Campaign Cost Per Opportunity Attributed Revenue based on the Linear attribution model. This metric is calculated as follows: Total CX Campaign Cost/CX Campaign Attributed Pipeline Revenue (Linear Attribution)                      |
| CX Campaign Cost Per Won Line Revenue (Linear Attribution)   | The total CX Campaign Cost Per Opportunity Attributed Revenue based on the Linear attribution model. This metric is calculated as follows: Total CX Campaign Cost/CX Campaign Attributed Pipeline Revenue for Won Revenue Line (Linear Attribution) |
| Open Opportunity Line Revenue (First Touch Attribution)      | The total Open Opportunity Line Revenue (for Opportunities associated to CX Campaigns) based on the First Touch attribution model.                                                                                                                  |
| Won Opportunity Line Revenue (First Touch Attribution)       | The total Won Opportunity Line Revenue (for Opportunities associated to CX Campaigns) based on the First Touch attribution model.                                                                                                                   |
| Lost Opportunity Line Revenue (First Touch Attribution)      | The total Lost Opportunity Line Revenue (for Opportunities associated to CX Campaigns) based on the First Touch attribution model.                                                                                                                  |
| No Sales Opportunity Line Revenue (First Touch Attribution)  | The total No Sale Opportunity Line Revenue (for Opportunities associated to CX Campaigns) based on the First Touch attribution model.                                                                                                               |

| Metric                                                            | Metric Definition                                                                                                                                                                                                                                             |
|-------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Average Won Opportunity Line Revenue (First Touch Attribution)    | The average Won Opportunity Line Revenue. This metric is computed as follows: Won Opportunity Line Revenue (First Touch Attribution)/# of Won Opportunity Revenue Lines                                                                                       |
| CX Campaign Attributed Pipeline Revenue (First Touch Attribution) | The total Pipeline revenue attributable to the CX Campaign based on the First touch attribution model (Revenue divided equally amongst all the CX Campaigns associated to the Opportunity)                                                                    |
| CX Campaign ROI (First Touch Attribution)                         | The ROI of the CX Campaign based on the First touch attribution model. This metric is calculated as follows: (CX Campaign Attributed Pipeline Revenue (First touch Attribution)- Actual Cost ) / Actual Cost                                                  |
| CX Campaign Cost Per Attributed Revenue (First Touch Attribution) | The total CX Campaign Cost Per Opportunity Attributed Revenue based on the First touch attribution model. This metric is calculated as follows: Total CX Campaign Cost/CX Campaign Attributed Pipeline Revenue (First touch Attribution)                      |
| CX Campaign Cost Per Won Line Revenue (First Touch Attribution)   | The total CX Campaign Cost Per Opportunity Attributed Revenue based on the First touch attribution model. This metric is calculated as follows: Total CX Campaign Cost/CX Campaign Attributed Pipeline Revenue for Won Revenue Line (First touch Attribution) |
| Open Opportunity Line Revenue (Last Touch Attribution)            | The total Open Opportunity Line Revenue (for Opportunities associated to CX Campaigns) based on the Last Touch attribution model.                                                                                                                             |
| Won Opportunity Line Revenue (Last Touch Attribution)             | The total Won Opportunity Line Revenue (for Opportunities associated to CX Campaigns) based on the Last Touch attribution model.                                                                                                                              |
| Lost Opportunity Line Revenue (Last Touch Attribution)            | The total Lost Opportunity Line Revenue (for Opportunities associated to CX Campaigns) based on the Last Touch attribution model.                                                                                                                             |
| No Sales Opportunity Line Revenue (Last Touch Attribution)        | The total No Sale Opportunity Line Revenue (for Opportunities associated to CX Campaigns) based on the Last Touch attribution model.                                                                                                                          |
| Average Won Opportunity Line Revenue (Last Touch Attribution)     | The average Won Opportunity Line Revenue. This metric is computed as follows: Won Opportunity Line Revenue (Last Touch Attribution)/# of Won Opportunity Revenue Lines                                                                                        |
| CX Campaign Attributed Pipeline Revenue (Last Touch Attribution)  | The total Pipeline revenue attributable to the CX Campaign based on the Last touch attribution model (Revenue divided equally amongst all the CX Campaigns associated to the Opportunity)                                                                     |
| CX Campaign ROI (Last Touch Attribution)                          | The ROI of the CX Campaign based on the Last touch attribution model. This metric is calculated as follows: (CX Campaign Attributed Pipeline Revenue (Last touch Attribution)- Actual Cost ) / Actual Cost                                                    |
| CX Campaign Cost Per Attributed Revenue (Last Touch Attribution)  | The total CX Campaign Cost Per Opportunity Attributed Revenue based on the Last touch attribution model. This metric is calculated as follows: Total CX Campaign Cost/CX Campaign Attributed Pipeline Revenue (Last touch Attribution)                        |
| CX Campaign Cost Per Won Line Revenue (Last Touch Attribution)    | The total CX Campaign Cost Per Opportunity Attributed Revenue based on the Last touch attribution model. This metric is calculated as follows: Total CX Campaign Cost/ Campaign Attributed Pipeline Revenue for Won Revenue Line (Last touch Attribution)     |

| Metric                                                         | Metric Definition                                                                                                                                                                                                                                       |
|----------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Open Opportunity Line Revenue (U-Shaped Attribution)           | The total Open Opportunity Line Revenue (for Opportunities associated to CX Campaigns) based on the U-Shaped attribution model.                                                                                                                         |
| Won Opportunity Line Revenue (U-Shaped Attribution)            | The total Won Opportunity Line Revenue (for Opportunities associated to CX Campaigns) based on the U-Shaped attribution model.                                                                                                                          |
| Lost Opportunity Line Revenue (U-Shaped Attribution)           | The total Lost Opportunity Line Revenue (for Opportunities associated to CX Campaigns) based on the U-Shaped attribution model.                                                                                                                         |
| No Sales Opportunity Line Revenue (U-Shaped Attribution)       | The total No Sale Opportunity Line Revenue (for Opportunities associated to CX Campaigns) based on the U-Shaped attribution model.                                                                                                                      |
| Average Won Opportunity Line Revenue (U-Shaped Attribution)    | The average Won Opportunity Line Revenue. This metric is computed as follows: Won Opportunity Line Revenue (U-Shaped Attribution)/# of Won Opportunity Revenue Lines                                                                                    |
| CX Campaign Attributed Pipeline Revenue (U-Shaped Attribution) | The total Pipeline revenue attributable to the campaign based on the U-Shaped attribution model (Revenue divided equally amongst all the CX Campaigns associated to the Opportunity)                                                                    |
| CX Campaign ROI (U-Shaped Attribution)                         | The ROI of the CX Campaign based on the U-Shaped attribution model. This metric is calculated as follows: (CX Campaign Attributed Pipeline Revenue (U-Shaped attribution)- Actual Cost ) / Actual Cost                                                  |
| CX Campaign Cost Per Attributed Revenue (U-Shaped Attribution) | The total CX Campaign Cost Per Opportunity Attributed Revenue based on the U-Shaped attribution. This metric is calculated as follows: Total CX Campaign Cost/CX Campaign Attributed Pipeline Revenue (U-Shaped attribution)                            |
| CX Campaign Cost Per Won Line Revenue (U-Shaped Attribution)   | The total CX Campaign Cost Per Opportunity Attributed Revenue based on the U-Shaped attribution model. This metric is calculated as follows: Total CX Campaign Cost/CX Campaign Attributed Pipeline Revenue for Won Revenue Line (U-Shaped attribution) |

## CX - Lead Activity

This table describes the Lead Activity Metrics.

| Metric                                       | Metric Definition                                                                                                                     |
|----------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|
| # 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 Activities                         | The total Activities associated to Leads                                                                                              |
| # of Lead Activities for Highly Ranked Leads | The total Activities for highly ranked Leads (Lead Rank = Hot)                                                                        |
| # 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)                                                                        |

| Metric                                             | Metric Definition                                                                                                                                                          |
|----------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| # of Open Lead Activities                          | The total Open Activities associated to Leads (Activity Status not equal to Complete/Cancelled)                                                                            |
| 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: $100 * \# \text{ of Activities for Rejected Leads} / \# \text{ of Rejected Leads}$          |
| 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: $\text{Activity duration for completed activity} / \# \text{ of Completed Activities}$ |
| 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 First Response Time                           | The time to respond to an assigned Lead. This metric is computed as follows: $\text{Date of first Lead Activity} - \text{Lead assigned date}$                              |
| 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

This table describes the Lead metrics.

These metrics are used in the Document Currency (DC), CX Currency (CC), and Analytics Currency (AC) fact folders in this subject area. Document Currency is the currency used while entering the data in the application. CX Currency is the currency defined in Oracle CRM. Analytics Currency is the currency defined in the application. Analytics Currency and Exchange Rate Type are configured during product implementation. The Exchange Rate date basis uses the Lead Creation Date to convert to the analytics currency. Metrics in these folders show amounts in their respective currencies.

| Metric                        | Metric Definition                                                                               |
|-------------------------------|-------------------------------------------------------------------------------------------------|
| # of Accepted Leads           | The total Accepted Leads (Accepted Flag = Y)                                                    |
| # of Accounts Leads Converted | The total Converted Leads from Account (Lead Status = Converted, Sales Account Type = Customer) |
| # of Assigned Leads           | The total assigned leads (Assignment status = Assigned)                                         |

| Metric                                            | Metric Definition                                                                                                                                                                                                      |
|---------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| # of Contacts with Leads                          | The total Contacts with Leads                                                                                                                                                                                          |
| # of highly Ranked Qualified Leads                | The total Qualified Hot Leads (Lead Status = Qualified, Rank Name = Hot)                                                                                                                                               |
| # of Leads                                        | The total number of Leads                                                                                                                                                                                              |
| # of Leads Converted                              | The total Converted Leads (Lead Status = Converted)                                                                                                                                                                    |
| # 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 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 Low Ranked Qualified Leads                   | The total Qualified Cool Leads (Lead Status = Qualified, Rank Name = Cool)                                                                                                                                             |
| # of Medium Ranked Qualified Leads                | The total Qualified Warm Leads (Lead Status = Qualified, Rank Name = Warm)                                                                                                                                             |
| # of Partner Assigned Leads                       | The total leads assigned to a Partner                                                                                                                                                                                  |
| # of Prospect Leads Converted                     | The total Converted Leads from Prospect(Lead Status = Converted, Sales Account Type = Prospect)                                                                                                                        |
| # of Qualified Expired Leads                      | The total Qualified Expired Leads (Lead Status = Qualified, Current Date > Lead Expiry Date)                                                                                                                           |
| # of Qualified Leads                              | The total Qualified Leads (Lead Status = Qualified)                                                                                                                                                                    |
| # of Rejected Leads                               | The total Rejected Leads (Assignment Status = Rejected)                                                                                                                                                                |
| # of Retired Leads                                | The total Retired Leads (Lead Status = Retired)                                                                                                                                                                        |
| # of Sales Accounts with Leads                    | The total Accounts with Leads                                                                                                                                                                                          |
| # 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)                                                                                                                                                                |
| 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 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                                                                          |
| 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                                                                              |
| Budget Amount                                     | The total Budget Amount                                                                                                                                                                                                |
| 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                                                              |
| Lead Qualification Rate (%)                       | Rate of Qualified Leads to the total Leads. This metric is computed as follows: $100 * \# \text{ of Qualified Leads} / \# \text{ of Leads}$                                                                            |
| Lead Qualification to Conversion Velocity         | Rate of Converting the Qualified Leads. This metric is computed as follows: $\text{Lead Converted Date} - \text{Lead Qualified Date} / \# \text{ of Converted Leads}$                                                  |

| Metric                                                              | Metric Definition                                                                                                                                         |
|---------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------|
| Lead Qualification Velocity                                         | Rate of Qualifying the Leads. This metric is computed as follows: $\text{Lead Qualified Date} - \text{Lead Created Date} / \# \text{ of Qualified Leads}$ |
| Leads Conversion % (Across Levels in Lead Owner Resource Hierarchy) | Lead to Opportunity Conversion % calculated at the total level of lead owner hierarchy                                                                    |
| 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                                                                 |
| Leads to Opportunity Conversion (%)                                 | Rate of Converted Leads to the total Leads. This metric is computed as follows: $\# \text{ of Converted Leads} / \# \text{ of Leads}$                     |
| Potential Revenue                                                   | The total Lead Revenue                                                                                                                                    |
| Ratio of Converted Leads to Qualified Leads                         | Ratio of Converted Leads to Qualified Leads                                                                                                               |
| Ratio of Highly Ranked Qualified Leads to Qualified Leads           | Ratio of Highly Ranked Qualified Leads to Qualified Leads                                                                                                 |
| Ratio of Low Ranked Qualified Leads to Qualified Leads              | Ratio of Low 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 Qualified Leads to Unqualified Leads                       | Ratio of Qualified Leads to Unqualified Leads                                                                                                             |
| Ratio of Retired Leads to Ratio of Unqualified Leads                | Ratio of Retired Leads to Unqualified Leads                                                                                                               |
| Raw Lead Amount                                                     | The total Raw Lead Amount                                                                                                                                 |
| 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: $\# \text{ of Retired Leads} / \# \text{ of Leads}$                         |
| Total Market Potential                                              | The total Lead Revenue for Qualified or Unqualified Leads                                                                                                 |

## CX - Opportunity

This table describes the Opportunity Metrics.

| Metric                                 | Metric Definition                                                                                                                                                            |
|----------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| # of Accounts with Won Opportunities   | The total Accounts with Won Opportunities                                                                                                                                    |
| # of Competitive Lost Opportunities    | The total Lost Opportunities with atleast one Competitor                                                                                                                     |
| # of Competitive No Sale Opportunities | The total No Sale Opportunities with atleast one Competitor                                                                                                                  |
| # of Competitive Open Opportunities    | The total Open Opportunities with atleast one Competitor                                                                                                                     |
| # of Competitive Opportunities         | The total Opportunities with atleast one Competitor                                                                                                                          |
| # of Competitive Won Opportunities     | The total Won Opportunities with atleast one Competitor                                                                                                                      |
| # of Converted Lost Opportunities      | The total Lost 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 Opportunities           | The total Opportunities which were created by converting the Leads.                                                                                                          |
| # of Converted Won Opportunities       | The total Won Opportunities which were created by converting the Leads.                                                                                                      |
| # of Expansion Opportunities           | The total Expansion Opportunities (Opportunity Type Code = Expansion)                                                                                                        |
| # of Expired Opportunities             | The total Expired Opportunities. This metric is computed as follows: $\text{Opportunity Status} = \text{Open}, \text{Current Date} > \text{Opportunity Expected Close Date}$ |

| Metric                                | Metric Definition                                                                                                                                                       |
|---------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| # 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 Lost Opportunities               | The total Lost Opportunities (Opportunity Status = Lost)                                                                                                                |
| # of Lost Renewal Opportunities       | The total Lost Renewal Opportunities (Opportunity Status = Lost and Opportunity Type Code = Renewal)                                                                    |
| # of New Opportunities                | The total New Opportunities (Opportunity Type Code = New)                                                                                                               |
| # of No Sale Expansion Opportunities  | The total No Sale Expansion Opportunities (Opportunity Status = No Sale and Opportunity Type Code = Expansion)                                                          |
| # of No Sale Opportunities            | The total No Sale Opportunities (Opportunity Status = No Sale)                                                                                                          |
| # of No Sale Renewal Opportunities    | The total No Sale Renewal Opportunities (Opportunity Status = No Sale 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)                                                                            |
| # of Open Opportunities               | The total Open Opportunities (Opportunity Status = Open)                                                                                                                |
| # of Open Renewal Opportunities       | The total Open Renewal Opportunities (Opportunity Status = Open and Opportunity Type Code = Renewal)                                                                    |
| # of Opportunities                    | The total number of Opportunities                                                                                                                                       |
| # of Renewal Opportunities            | The total Renewal Opportunities (Opportunity Type Code = Renewal)                                                                                                       |
| # of Unconverted Closed Opportunities | The total Closed Opportunities which were not created by converting the Leads.                                                                                          |
| # of Unconverted Opportunities        | The total 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.                                                                                             |
| # 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 Won Opportunities                | The total Won Opportunities (Opportunity Status = Won)                                                                                                                  |
| # of Won Renewal Opportunities        | The total Won Renewal Opportunities (Opportunity Status = Won and Opportunity Type Code = Renewal)                                                                      |
| # of No Sale New Opportunities        | The total No Sale New Opportunities (Opportunity Status = No Sale and Opportunity Type Code = New)                                                                      |
| 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 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 Converted Opportunity  | Average Age of Converted Opportunities. This metric is computed as follows: sum(Opportunity Close Date - Opportunity Creation Date)/# of Converted Closed Opportunities |

| Metric                                                | Metric Definition                                                                                                                                                                                                                 |
|-------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 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 Lost Opportunities                     | Average Age of Lost Opportunities. This metric is computed as follows: $\text{Total Lost Opportunities Age} / \# \text{ of Lost Opportunities}$                                                                                   |
| Average Age of No Sale Opportunities                  | Average Age of No Sale Opportunities. This metric is computed as follows: $\text{Total No Sale Opportunities Age} / \text{number of No Sale Opportunities}$                                                                       |
| 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: $\text{sum}(\text{Opportunity Close Date} - \text{Opportunity Creation Date}) / \# \text{ of Unconverted Won Opportunities}$                    |
| Average Age of Won Opportunities                      | Average Age of Won Opportunities. This metric is computed as follows: $\text{Total Won Opportunities Age} / \# \text{ of Won Opportunities}$                                                                                      |
| Average Opportunity Win Probability                   | Average probability to Win the Opportunity. This metric is computed as follows: $\text{Total win probabilities} / \# \text{ of Opportunities}$                                                                                    |
| 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: $100 * \text{Total Competitive Won Opportunities} / \text{Total Competitive Opportunities}$                                                     |
| Competitor Win Rate                                   | Rate of Winning Competitive Opportunities. This metric is computed as follows: $100 * \text{Total Competitive Won Opportunities} / \text{Total Competitive Won and Lost Opportunities}$                                           |
| Conversion Rate                                       | Rate of Converting Opportunities. This metric is computed as follows: $100 * \text{Total Won Opportunities} / \text{Total Opportunities}$                                                                                         |
| 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 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 Lost Opportunities %   | The ratio of Converted Lost Opportunities (created from Leads) in all the Lost Opportunities. This metric is computed as follows: $(\# \text{ of Converted Lost Opportunities} / \# \text{ of Lost Opportunities}) * 100$         |
| Expansion Opportunities Conversion Rate               | The Conversion rate of the Expansion Opportunities. This metric is computed as follows: $(\# \text{ of Won Expansion Opportunities} / \# \text{ of Expansion Opportunities})$                                                     |

| Metric                                                                         | Metric Definition                                                                                                                                                                                                                               |
|--------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Expansion Opportunities Loss Rate                                              | The Loss rate of the Expansion Opportunities. This metric is computed as follows: $(\# \text{ of Lost Expansion Opportunities} / \# \text{ of Won+Lost Expansion Opportunities})$                                                               |
| Expansion Opportunities Win Rate                                               | The Win Rate of the Expansion Opportunities. This metric is computed as follows: $(\# \text{ of Won Expansion Opportunities} / \# \text{ of Won+Lost Expansion Opportunities})$                                                                 |
| Loss Rate                                                                      | Rate of Losing Opportunities. This metric is computed as follows: $100 * \text{Total Lost Opportunities} / \text{Total Won and Lost Opportunities}$                                                                                             |
| New Opportunities Conversion Rate                                              | The Conversion rate of the New Opportunities. This metric is computed as follows: $(\# \text{ of Won New Opportunities} / \# \text{ of New Opportunities})$                                                                                     |
| New Opportunities Loss Rate                                                    | The Loss rate of the New Opportunities. This metric is computed as follows: $(\# \text{ of Lost New Opportunities} / \# \text{ of Won+Lost New Opportunities})$                                                                                 |
| New Opportunities Win Rate                                                     | The Win Rate of the New Opportunities. This metric is computed as follows: $(\# \text{ of Won New Opportunities} / \# \text{ of Won+Lost New Opportunities})$                                                                                   |
| 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: $(\# \text{ of Lost Opportunities} - \# \text{ of Converted Lost Opportunities}) / \# \text{ of Converted Lost Opportunities}$ |
| Renewal Opportunities Conversion Rate                                          | The Conversion rate of the Renewal Opportunities. This metric is computed as follows: $(\# \text{ of Won Renewal Opportunities} / \# \text{ of renewal Opportunities})$                                                                         |
| Renewal Opportunities Loss Rate                                                | The Loss rate of the Renewal Opportunities. This metric is computed as follows: $(\# \text{ of Lost Renewal Opportunities} / \# \text{ of Won+Lost renewal Opportunities})$                                                                     |
| Renewal Opportunities Win Rate                                                 | The Win Rate of the Renewal Opportunities. This metric is computed as follows: $(\# \text{ of Won Renewal Opportunities} / \# \text{ of Won+Lost renewal Opportunities})$                                                                       |
| Win Rate                                                                       | Rate of Winning Opportunities. This metric is computed as follows: $100 * \text{Total Won Opportunities} / \text{Total Won and Lost Opportunities}$                                                                                             |

## CX - Opportunity Activity

This table describes the Opportunity Activity Metrics.

| Metric                                | Metric Definition                                                                                                                             |
|---------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------|
| # 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 Open Opportunity Activities      | The total Open Activities associated to Opportunities (Activity Status not equal to Complete/Cancelled)                                       |
| # of Opportunity Activities           | The total Activities associated to Opportunities                                                                                              |
| # 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)                                                                 |

| Metric                                               | Metric Definition                                                                                                                                                                                                 |
|------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| # of Opportunity Tasks                               | The total Tasks associated to Opportunities (Activity function = Task)                                                                                                                                            |
| 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: $100 * \# \text{ of Activities for No Sale Opportunities} / \# \text{ of No Sale Opportunities}$                            |
| 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 - Opportunities                        | The rate of Activities for Opportunities. This metric is computed as follows: $100 * \# \text{ of Opportunity Activities} / \# \text{ of Opportunities}$                                                          |
| Activity Rate - Won Opportunities                    | The rate of Activities for Won Opportunities. This metric is computed as follows: $100 * \# \text{ of Activities for Won Opportunities} / \# \text{ of Won Opportunities}$                                        |
| 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: $100 * \# \text{ of Appointments for No Sale Opportunities} / \# \text{ of No Sale Opportunities}$                        |
| 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: $100 * \# \text{ of Appointments for Won Opportunities} / \# \text{ of Won Opportunities}$                                    |
| Average Activity Duration for Completed Activities   | The average time taken to complete an activity. This metric is computed as follows: $\text{Activity duration for completed activity} / \# \text{ of Completed Activities}$                                        |
| Average Activity Duration For Open Activities        | The average time of an activity. This metric is computed as follows: $\text{Activity duration for Activities not in Cancelled or Complete status} / \# \text{ of Activities not in Cancelled or Complete status}$ |
| Average Number of Calls for Lost Opportunities       | The average number of Calls for Lost Opportunities. This metric is computed as follows: $\# \text{ of Activities of type code = Calls for Lost Opportunities} / \# \text{ of Lost Opportunities}$                 |
| Average Number of Calls for Won Opportunities        | The average number of Calls for Won Opportunities. This metric is computed as follows: $\# \text{ of Activities of type code = Calls for Won Opportunities} / \# \text{ of Won Opportunities}$                    |
| 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 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 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 Emails Sent for Won Opportunities  | The average number of Emails sent for Won Opportunities. This metric is computed as follows: $\# \text{ of Activities of type code = Email for Won Opportunities} / \# \text{ of Won Opportunities}$              |

| Metric                                                   | Metric Definition                                                                                                                                                                          |
|----------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Average Number of Meetings for Lost Opportunities        | The average number of Meetings for Lost Opportunities. This metric is computed as follows: # of Activities of type code = Meetings for Lost Opportunities/# of Lost Opportunities          |
| Average Number of Meetings for Won Opportunities         | The average number of Meetings for Won Opportunities. This metric is computed as follows: # of Activities of type code = Meetings for Won Opportunities/# of Won Opportunities             |
| Average Number of Opportunity Activities Per Team Member | The average number of Opportunity Activities per Team member                                                                                                                               |
| 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: $100 * \# \text{ of Call Reports for No Sale Opportunities} / \# \text{ of No Sale Opportunities}$ |
| 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: $100 * \# \text{ of Call Reports for Won Opportunities} / \# \text{ of Won Opportunities}$             |
| 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: $100 * \# \text{ of Tasks for No Sale Opportunities} / \# \text{ of No Sale Opportunities}$               |
| 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: $100 * \# \text{ of Tasks for Won Opportunities} / \# \text{ of Won Opportunities}$                           |

## CX - Opportunity Quote

This table describes the Opportunity Quotes Metrics.

| Metric                           | Metric Definition                                                                                                                       |
|----------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------|
| # of Active Quotes               | The total number of Active Quotes                                                                                                       |
| # of Active Quotes with Proposal | The total number of Active Quotes with Proposal                                                                                         |
| # of Closed Active Quotes        | The total number of Active Quotes Closed (Won+Lost)                                                                                     |
| # of Expired Quotes              | The total number of Expired Quotes                                                                                                      |
| # of In-Progress Active Quotes   | The total number of Active In-Progress Quotes                                                                                           |
| # of Lost Active Quotes          | The total number of Active Quotes Lost                                                                                                  |
| # 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) |
| # of Won Active Quotes           | The total number of Active Quotes Won                                                                                                   |

| Metric                                           | Metric Definition                                                                                                                                                                                                                     |
|--------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Active Quote Conversion Rate                     | The rate of converting the Active Quotes. This metric is computed as follows: $100 * \# \text{ of Closed Quotes} / \# \text{ of Active Quotes}$                                                                                       |
| 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 to Contract Start Time              | The time to start the Contract after the Quote is created. This metric is computed as follows: $(\text{Contract Start Date} - \text{Quote Creation Date}) / \# \text{ of Active Quotes}$                                              |
| Active Quote To Lost Opportunity Time            | The average time between Lost Opportunity Close Date and Quote creation date. This metric is computed as follows: $(\text{Opportunity Close Date} - \text{Quote Creation Date}) / \# \text{ of Active Quotes for Lost Opportunities}$ |
| Active Quote To Won Opportunity Time             | The average time between Won Opportunity Close Date and Quote creation date. This metric is computed as follows: $(\text{Opportunity Close Date} - \text{Quote Creation Date}) / \# \text{ of Active Quotes for Won Opportunities}$   |
| Active Quote Win Rate                            | The rate of winning Active Quotes. This metric is computed as follows: $100 * \# \text{ of Won Quotes} / \# \text{ of Closed Quotes}$                                                                                                 |
| Average # of Quotes for Lost Opportunities       | The average number of Quotes for Lost Opportunities. This metric is computed as follows: $\# \text{ of Quotes} / \# \text{ of Lost Opportunities}$                                                                                    |
| Average # of Quotes for No-Sale Opportunities    | The average number of Quotes for No Sale Opportunities. This metric is computed as follows: $\# \text{ of Quotes} / \# \text{ of No-Sale Opportunities}$                                                                              |
| Average # of Quotes for Open Opportunities       | The average number of Quotes for Open Opportunities. This metric is computed as follows: $\# \text{ of Quotes} / \# \text{ of Open Opportunities}$                                                                                    |
| Average # of Quotes for Won Opportunities        | The average number of Quotes for Won Opportunities. This metric is computed as follows: $\# \text{ of Quotes} / \# \text{ of Won Opportunities}$                                                                                      |
| Average Active Quote Cycle Time                  | The average Quote Cycle Time. This metric is computed as follows: $(\text{Quote Order Placed on Date} - \text{Quote Creation Date}) / \# \text{ of Active Quotes}$                                                                    |
| Average Contract Value (Active Quotes)           | The average Contract value per Active Quote. This metric is computed as follows: $\text{Total Contract Value} / \# \text{ of Active Quotes}$                                                                                          |
| Average Length of Contract (Active Quote)        | The average Length of the Contract. This metric is computed as follows: $(\text{Contract End Date} - \text{Contract Start Date}) / \# \text{ of Active Quotes}$                                                                       |
| Average Non Recurring Revenue (Active Quotes)    | The average Non-Recurring Revenue Amount from Active Quotes. This metric is computed as follows: $\text{Total Non-Recurring Revenue Amount} / \# \text{ of Active Quotes}$                                                            |
| Average Number of Active Quote Iterations        | The average number of Quotes created per Active Quote. This metric is computed as follows: $\# \text{ of Quotes} / \# \text{ of Active Quotes}$                                                                                       |
| Average Opportunity to Current Active Quote Time | The average time between Opportunity and Quote creation date. This metric is computed as follows: $(\text{Quote Creation Date} - \text{Opportunity Creation Date}) / \# \text{ of Active Quotes}$                                     |
| Average Recurring Revenue (Active Quotes)        | The average Recurring Revenue Amount from Active Quotes. This metric is computed as follows: $\text{Total Recurring Revenue Amount} / \# \text{ of Active Quotes}$                                                                    |
| Average Usage Revenue (Active Quotes)            | The average Usage Revenue Amount from Active Quotes. This metric is computed as follows: $\text{Total Usage Revenue Amount} / \# \text{ of Active Quotes}$                                                                            |
| Contract Value (Active Quotes)                   | The total Quote Contract value in Active Quotes                                                                                                                                                                                       |

| Metric                                       | Metric Definition                                         |
|----------------------------------------------|-----------------------------------------------------------|
| Non Recurring Revenue Amount (Active Quotes) | The total Non-Recurring Revenue Amount from Active Quotes |
| Raw Contract Value                           | The total Quote Contract value in all Quotes              |
| Raw Non Recurring Revenue Amount             | The total Non-Recurring Revenue Amount from all Quotes    |
| Raw Recurring Revenue Amount                 | The total Recurring Revenue Amount from all Quotes        |
| Raw Usage Revenue Amount                     | The total Usage Revenue Amount from all Quotes            |
| Recurring Revenue Amount (Active Quotes)     | The total Recurring Revenue Amount from Active Quotes     |
| Usage Revenue Amount (Active Quotes)         | The total Usage Revenue Amount from Active Quotes         |

## CX - Opportunity Quote Lines

This table describes the Opportunity Quote Line Metrics.

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

| Metric                                   | Metric Definition                                              |
|------------------------------------------|----------------------------------------------------------------|
| Raw Quote Line Recurring Revenue         | Total Recurring Revenue amount of Quote Lines                  |
| Raw Quote Line Usage Revenue             | Total Usage Revenue amount of Quote Lines                      |
| Raw Quote Line Contract Value            | Total Contract Value of Quote Lines                            |
| 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 Quote Line Discount %            | The Average Quote Line Discount Percentage.                    |

## CX - Opportunity Revenue Line

This table describes the Opportunity Revenue Line metrics.

These metrics are used in the Document Currency (DC), CX Currency (CC), and Analytics Currency (AC) fact folders in this subject area. Document Currency is the currency used while entering the data in the application. CX Currency is the currency defined in Oracle CRM. Analytics Currency is the currency defined in the application. Analytics Currency and Exchange Rate Type are configured during product implementation. The Exchange Rate date basis uses the Opportunity Expected Close Date to convert to the analytics currency. Metrics in these folders show amounts in their respective currencies.

| Metric                                                              | Metric Definition                                                                              |
|---------------------------------------------------------------------|------------------------------------------------------------------------------------------------|
| # of Competitive Opportunity Revenue Lines                          | The total Opportunity Revenue Lines with atleast one Competitor                                |
| # of Expansion Opportunity Revenue Lines                            | The total Expansion Opportunity Revenue Lines                                                  |
| # of Expired Opportunity Revenue Lines                              | The total Expired Opportunity Revenue Lines with atleast one Competitor                        |
| # of Lost Competitive Opportunity Revenue Lines                     | The total Lost Opportunity Revenue Lines with atleast one Competitor                           |
| # of Lost Opportunity Revenue Lines                                 | The total Lost Opportunity Revenue Lines (Revenue Status = Lost)                               |
| # of New Opportunity Revenue Lines                                  | The total New Opportunity Revenue Lines                                                        |
| # of No Sale Competitive Opportunity Revenue Lines                  | The total No Sale Opportunity Revenue Lines with atleast one Competitor                        |
| # of No Sale Opportunity Revenue Lines                              | The total No Sale Opportunity Revenue Lines (Revenue Status = No Sale)                         |
| # of Open Competitive Opportunity Revenue Lines                     | The total Open Opportunity Revenue Lines with atleast one Competitor                           |
| # of Open Opportunity Revenue Lines                                 | The total Open Opportunity Revenue Lines (Revenue Status = Open)                               |
| # of Opportunity Revenue Lines                                      | The total Opportunity Revenue Lines                                                            |
| # of Raw Opportunity Revenue Lines                                  | The total Raw Opportunity Revenue Lines                                                        |
| # of Won Competitive Opportunity Revenue Lines                      | The total Won Opportunity Revenue Lines with atleast one Competitor                            |
| # of Won Opportunity Revenue Lines                                  | The total Won Opportunity Revenue Lines (Revenue Status = Won)                                 |
| # of Renewal Opportunity Revenue Lines                              | The total Renewal Opportunity Revenue Lines                                                    |
| % 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 |

| Metric                                                                 | Metric Definition                                                                                                                                                                                      |
|------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| % 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 Year      | The % change in Average Won Opportunity Line Revenue compared to the Last Year, 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 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 Year             | The % change in Lost Opportunity Line Revenue compared to the Last Year, 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 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 Year          | The % change in No Sale Opportunity Line Revenue compared to the Last Year, 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 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 Year             | The % change in Open Opportunity Line Revenue compared to the Last Year, 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 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 Year    | The % change in Weighted Open Opportunity Line Revenue compared to the Last Year, 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 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 Year              | The % change in Won Opportunity Line Revenue compared to the Last Year, at this time                                                                                                                   |
| % 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) |
| % 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 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 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)     |

| Metric                                           | Metric Definition                                                                                                                                                                                                                |
|--------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Average # of Days Open                           | The average number of days an Opportunity Revenue Line is Open. This metric is computed as follows: (Current Date - Open Opportunity Revenue Line Creation Date)/# of Open 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: sum(Lost Revenue Line Close Date - Lost Revenue Line Created Date)/# 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: sum(No Sale Revenue Line Close Date - No Sale Revenue Line Created Date)/# 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: sum(Won/Lost/No Sale Revenue Line Close Date - Won/Lost/No Sale Revenue Line Created Date)/# of Won+Lost+No Sale 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: sum(Won Revenue Line Close Date - Won Revenue Line Created Date)/# of Won Opportunity Revenue Lines                                    |
| 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                                                                                    |
| Competitive Opportunity Line Revenue             | The total Opportunity Line Revenue with atleast one competitor                                                                                                                                                                   |
| 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)                                                                                                                     |
| Expansion Open Opportunity Line Revenue          | The total Open Expansion Opportunity Line Revenue (Revenue Type = Expansion and Revenue Status = Open)                                                                                                                           |
| Expansion Opportunity Line Revenue               | The total Expansion Opportunity Line Revenue (Revenue Type = Expansion)                                                                                                                                                          |
| Expansion Won Opportunity Line Revenue           | The total Won Expansion Opportunity Line Revenue (Revenue Type = Expansion and Revenue Status = Won)                                                                                                                             |
| Expected Opportunity Line Revenue                | The total Expected Opportunity Line Revenue                                                                                                                                                                                      |
| Expired Opportunity Line Revenue                 | The total Expired Opportunity Line Revenue (status = Open and Current Date > Expected Close date for Revenue Line)                                                                                                               |
| Lost Competitive Opportunity Line Revenue        | The total Lost Opportunity Line Revenue with atleast one competitor                                                                                                                                                              |
| Lost Opportunity Line Non-Recurring Revenue      | The total Lost Opportunity Line Non-Recurring Revenue (Revenue Status = Lost)                                                                                                                                                    |
| Lost Opportunity Line Recurring Revenue          | The total Lost Opportunity Line Recurring Revenue (Revenue Status = Lost)                                                                                                                                                        |
| Lost Opportunity Line Revenue                    | The total Lost Opportunity Line Revenue (Revenue Status = Lost)                                                                                                                                                                  |
| Lost Opportunity Line Usage Revenue              | The total Lost Opportunity Line Usage Revenue (Revenue Status = Lost)                                                                                                                                                            |
| 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)                                                                                                                                 |

| Metric                                         | Metric Definition                                                                                                 |
|------------------------------------------------|-------------------------------------------------------------------------------------------------------------------|
| New Open Opportunity Line Revenue              | The total Open New Opportunity Line Revenue (Revenue Type = New and Revenue Status = Open)                        |
| New Opportunity Line Revenue                   | The total New Opportunity Line Revenue (Revenue Type = New)                                                       |
| New Won Opportunity Line Revenue               | The total Won New Opportunity Line Revenue (Revenue Type = New and Revenue Status = Won)                          |
| No Sale Competitive Opportunity Line Revenue   | The total No Sale Opportunity Line Revenue with atleast one competitor                                            |
| No Sale Opportunity Line Non-Recurring Revenue | The total No Sale Opportunity Line Non-Recurring Revenue (Revenue Status = No Sale)                               |
| No Sale Opportunity Line Recurring Revenue     | The total No Sale Opportunity Line Recurring Revenue (Revenue Status = No Sale)                                   |
| No Sale Opportunity Line Revenue               | The total No Sale Opportunity Line Revenue (Revenue Status = No Sale)                                             |
| No Sale Opportunity Line Usage Revenue         | The total No Sale Opportunity Line Usage Revenue (Revenue Status = No Sale)                                       |
| 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) |
| 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 Opportunity Line Revenue           | The total Non-Renewal Opportunity Line Revenue (Revenue Type = Do not Renew)                                      |
| Non-Renewal Won Opportunity Line Revenue       | The total Won Non-Renewal Opportunity Line Revenue (Revenue Type = Do not Renew and Revenue Status = Won)         |
| Open Competitive Opportunity Line Revenue      | The total Open Opportunity Line Revenue with atleast one competitor                                               |
| Open Opportunity Line Non-Recurring Revenue    | The total Open Opportunity Line Non-Recurring Revenue (Revenue Status = Open)                                     |
| Open Opportunity Line Recurring Revenue        | The total Open Opportunity Line Recurring Revenue (Revenue Status = Open)                                         |
| Open Opportunity Line Revenue                  | The total Open Opportunity Line Revenue (Revenue Status = Open)                                                   |
| Open Opportunity Line Usage Revenue            | The total Open Opportunity Line Usage Revenue (Revenue Status = Open)                                             |
| Opportunity Line Non-Recurring Revenue         | The total Opportunity Line Non-Recurring Revenue                                                                  |
| Opportunity Line Recurring Revenue             | The total Opportunity Line Recurring Revenue                                                                      |
| Opportunity Line Revenue                       | The total Opportunity Line Revenue                                                                                |
| Opportunity Line Split Revenue                 | The total Opportunity Line Split Revenue                                                                          |
| Opportunity Line Usage Revenue                 | The total Opportunity Line Usage Revenue                                                                          |
| Raw Opportunity Line Revenue                   | The total Raw Opportunity Line Revenue                                                                            |
| 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)            |
| Renewal Open Opportunity Line Revenue          | The total Open Renewal Opportunity Line Revenue (Revenue Type = Renew and Revenue Status = Open)                  |

| Metric                                     | Metric Definition                                                                                                                                                                           |
|--------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Renewal Opportunity Line Revenue           | The total Renewal Opportunity Line Revenue (Revenue Type = Renew)                                                                                                                           |
| Renewal Won Opportunity Line Revenue       | The total Won Renewal Opportunity Line Revenue (Revenue Type = Renew and Revenue Status = Won)                                                                                              |
| 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 Loss Rate         | The Competitive Revenue Line Loss rate. This metric is computed as follows: $100 * \# \text{ of Lost competitive Revenue Lines} / \# \text{ of Won+Lost Competitive Revenue Lines}$         |
| 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 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 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 Won Rate                      | The Revenue Line Win rate. This metric is computed as follows: $100 * \# \text{ of Won Opportunity Revenue Lines} / \# \text{ of Won+Lost Opportunity Revenue Lines}$                       |
| Weighted Open Opportunity Line Revenue     | The total Weighted Opportunity Line Revenue. This metric is computed as follows: $\text{Open Opportunity Revenue} * \text{Win Probability}$                                                 |
| Won Competitive Opportunity Line Revenue   | The total Won Opportunity Line Revenue with atleast one competitor                                                                                                                          |
| Won Opportunity Line Non-Recurring Revenue | The total Won Opportunity Line Non-Recurring Revenue (Revenue Status = Won)                                                                                                                 |
| Won Opportunity Line Recurring Revenue     | The total Won Opportunity Line Recurring Revenue (Revenue Status = Won)                                                                                                                     |
| Won Opportunity Line Revenue               | The total Won Opportunity Line Revenue (Revenue Status = Won)                                                                                                                               |
| Won Opportunity Line Usage Revenue         | The total Won Opportunity Line Usage Revenue (Revenue Status = Won)                                                                                                                         |
| Average Revenue Line Discount %            | The Average Revenue Line Discount Percentage.                                                                                                                                               |

## CX - Opportunity Revenue Line Snapshot

This table describes the Opportunity Revenue Line Snapshot metrics.

These metrics are used in the Document Currency (DC), CX Currency (CC), and Analytics Currency (AC) fact folders in this subject area. Document Currency is the currency used while entering the data in the application. CX Currency is the currency defined in Oracle CRM. Analytics Currency is the currency defined in the application. Analytics Currency and Exchange Rate Type are configured during product implementation. The Exchange Rate date basis uses the Opportunity Expected Close Date to convert to analytics currency. Metrics in these folders show amounts in their respective currencies.

| Metric                                     | Metric Definition                                               |
|--------------------------------------------|-----------------------------------------------------------------|
| # of Competitive Opportunity Revenue Lines | The total Opportunity Revenue Lines with atleast one Competitor |

| Metric                                                                 | Metric Definition                                                                                 |
|------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------|
| # of Expired Opportunity Revenue Lines                                 | The total Expired Opportunity Revenue Lines with atleast one Competitor                           |
| # of Lost Competitive Opportunity Revenue Lines                        | The total Lost Opportunity Revenue Lines with atleast one Competitor                              |
| # of Lost Opportunity Revenue Lines                                    | The total Lost Opportunity Revenue Lines (Revenue Status = Lost)                                  |
| # of No Sale Competitive Opportunity Revenue Lines                     | The total No Sale Opportunity Revenue Lines with atleast one Competitor                           |
| # of No Sale Opportunity Revenue Lines                                 | The total No Sale Opportunity Revenue Lines (Revenue Status = No Sale)                            |
| # of Open Competitive Opportunity Revenue Lines                        | The total Open Opportunity Revenue Lines with atleast one Competitor                              |
| # of Open Opportunity Revenue Lines                                    | The total Open Opportunity Revenue Lines (Revenue Status = Open)                                  |
| # of Opportunity Revenue Lines                                         | The total Opportunity Revenue Lines                                                               |
| # of Raw Opportunity Revenue Lines                                     | The total Raw Opportunity Revenue Lines                                                           |
| # of Won Competitive Opportunity Revenue Lines                         | The total Won Opportunity Revenue Lines with atleast one Competitor                               |
| # of Won Opportunity Revenue Lines                                     | The total Won Opportunity Revenue Lines (Revenue Status = Won)                                    |
| % 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    |
| % 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 Year      | The % change in Average Won Opportunity Line Revenue compared to the Last Year, 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 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 Year             | The % change in Lost Opportunity Line Revenue compared to the Last Year, 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 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 Year          | The % change in No Sale Opportunity Line Revenue compared to the Last Year, 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 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 Year             | The % change in Open Opportunity Line Revenue compared to the Last Year, 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 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 Year    | The % change in Weighted Open Opportunity Line Revenue compared to the Last Year, 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 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 Year    | The % change in Won Opportunity Line Revenue compared to the Last Year, at this time                                                                                                                                              |
| Average # of Days Open                                       | The average number of days an Opportunity Revenue Line is Open. This metric is computed as follows: (Current Date - Open Opportunity Revenue Line Creation Date)/# of Open 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: sum(Lost Revenue Line Close Date - Lost Revenue Line Created Date)/# of Lost Opportunity Revenue Lines                                 |
| Average Age of No Sale Opportunity Revenue Lines             | The average age of the No Sale Opportunity Revenue Lines (sum(No Sale Revenue Line Close Date - No Sale Revenue Line Created Date))/# 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: sum(Won/Lost/No Sale Revenue Line Close Date - Won/Lost/No Sale Revenue Line Created Date))/# of Won+Lost+No Sale 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: sum(Won Revenue Line Close Date - Won Revenue Line Created Date))/# of Won Opportunity Revenue Lines                                    |
| 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                                                                                     |
| Competitive Opportunity Line Revenue                         | The total Opportunity Line Revenue with atleast one competitor                                                                                                                                                                    |
| Expected Opportunity Line Revenue                            | The total Expected Opportunity Line Revenue                                                                                                                                                                                       |
| Expired Opportunity Line Revenue                             | The total Expired Opportunity Line Revenue (status = Open and Current Date > Expected Close date for Revenue Line)                                                                                                                |
| Lost Competitive Opportunity Line Revenue                    | The total Lost Opportunity Line Revenue with atleast one competitor                                                                                                                                                               |
| Lost Opportunity Line Revenue                                | The total Lost Opportunity Line Revenue (Revenue Status = Lost)                                                                                                                                                                   |
| No Sale Competitive Opportunity Line Revenue                 | The total No Sale Opportunity Line Revenue with atleast one competitor                                                                                                                                                            |
| No Sale Opportunity Line Revenue                             | The total No Sale Opportunity Line Revenue (Revenue Status = No Sale)                                                                                                                                                             |
| Open Competitive Opportunity Line Revenue                    | The total Open Opportunity Line Revenue with atleast one competitor                                                                                                                                                               |
| Open Opportunity Line Revenue                                | The total Open Opportunity Line Revenue (Revenue Status = Open)                                                                                                                                                                   |
| Opportunity Line Revenue                                     | The total Opportunity Line Revenue                                                                                                                                                                                                |
| Opportunity Line Split Revenue                               | The total Opportunity Line Split Revenue                                                                                                                                                                                          |
| Raw Opportunity Line Revenue                                 | The total Raw Opportunity Line Revenue                                                                                                                                                                                            |
| Revenue Line Competitive Conversion Rate                     | The Competitive Revenue Line conversion rate. This metric is computed as follows: 100 * # of Won Competitive Revenue Lines/# of Competitive Opportunity Revenue Lines                                                             |
| Revenue Line Competitive Loss Rate                           | The Competitive Revenue Line Loss rate. This metric is computed as follows: 100 * # of Lost competitive Revenue Lines/# of Won+Lost Competitive Revenue Lines                                                                     |

| Metric                                                 | Metric Definition                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|--------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 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 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 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 Won Rate                                  | The Revenue Line Win rate. This metric is computed as follows: $100 * \# \text{ of Won Opportunity Revenue Lines} / \# \text{ of Won+Lost Opportunity Revenue Lines}$                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| Weighted Open Opportunity Line Revenue                 | The total Weighted Opportunity Line Revenue. This metric is computed as follows: $\text{Open Opportunity Revenue} * \text{Win Probability}$                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| Won Competitive Opportunity Line Revenue               | The total Won Opportunity Line Revenue with atleast one competitor                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| Won Opportunity Line Revenue                           | The total Won Opportunity Line Revenue (Revenue Status = Won)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| # of Changes to Expected Enterprise Line Close Date    | The total number of times the Revenue Line Expected Close Date has been changed in its lifecycle till the end of the selected snapshot period. e.g. If Q2 is the snapshot quarter selected, and if the date has been changed 10 times in total during the lifetime of the Revenue Line, and 2 times in Q2, then this will show 10 and not the count of date changes in the chosen snapshot period. (Note - This metric depends on the snapshot frequency e.g. if the snapshot frequency is weekly, and there are multiple changes done before the weekly snapshot is taken, those cannot be captured).   |
| # of Changes to Expected Enterprise Line Close Period  | The total number of times the Revenue Line Expected Close Period has been changed in its lifecycle till the end of the selected snapshot period. e.g. If Q2 is the snapshot quarter selected, and if the period has been changed 10 times in total during the lifetime of the Revenue Line, and 2 times in Q2, then this will show 10 and not the count of period changes in the chosen snapshot period. (Note - this depends on the snapshot frequency e.g. If the snapshot frequency is weekly, and there are multiple changes done before the weekly snapshot is taken, those cannot be captured).    |
| # of Changes to Expected Enterprise Line Close Quarter | The total number of times the Revenue Line Expected Close Quarter has been changed in its lifecycle till the end of the selected snapshot period. e.g. If Q2 is the snapshot quarter selected, and if the quarter has been changed 10 times in total during the lifetime of the Revenue Line, and 2 times in Q2, then this will show 10 and not the count of quarter changes in the chosen snapshot period. (Note - this depends on the snapshot frequency e.g. If the snapshot frequency is weekly, and there are multiple changes done before the weekly snapshot is taken, those cannot be captured). |

| Metric                                                                    | Metric Definition                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|---------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| # of Changes to Expected Enterprise Line Close Year                       | The total number of times the Revenue Line Expected Close Year has been changed in its lifecycle till the end of the selected snapshot period. e.g. If Q2 is the snapshot quarter selected, and if the year has been changed 10 times in total during the lifetime of the Revenue Line, and 2 times in Q2, then this will show 10 and not the count of year changes in the chosen snapshot period. (Note - this depends on the snapshot frequency e.g. If the snapshot frequency is weekly, and there are multiple changes done before the weekly snapshot is taken, those cannot be captured). |
| # of Revenue Lines moved out in the selected snapshot period              | The total Revenue Lines moved out of the selected snapshot period. Note: This data is for the selected snapshot period. e.g. If Q1 is the snapshot quarter chosen, only those revenue lines that were moved out in Q1 will be shown.                                                                                                                                                                                                                                                                                                                                                            |
| # of Revenue Lines moved out by 1 period in the selected snapshot period  | The total Revenue Lines moved out by 1 period from the selected snapshot period. Note: This data is for the selected snapshot period. e.g. If Q1 is the snapshot quarter chosen, only those revenue lines that were moved out in Q1 to Q2 will be shown.                                                                                                                                                                                                                                                                                                                                        |
| # of Revenue Lines moved out by 2 periods in the selected snapshot period | The total Revenue Lines moved out by 2 periods from the selected snapshot period. Note: This data is for the selected snapshot period. e.g. If Q1 is the snapshot quarter chosen, only those revenue lines that were moved out in Q1 to Q3 will be shown.                                                                                                                                                                                                                                                                                                                                       |
| # of Revenue Lines moved out by 3 periods in the selected snapshot period | The total Revenue Lines moved out by 3 periods from the selected snapshot period. Note: This data is for the selected snapshot period. e.g. If Q1 is the snapshot quarter chosen, only those revenue lines that were moved out in Q1 to Q4 will be shown.                                                                                                                                                                                                                                                                                                                                       |
| # of New Revenue Lines added in the selected snapshot period              | The total New Revenue Lines added to selected time period when the snapshot was taken. Note: This data is for the selected snapshot period. e.g. If Q2 is the snapshot quarter chosen, the revenue lines newly added in Q2 will be shown. (Note: When a snapshot is scheduled newly, all the Opportunities would show up as New Opportunities for the first snapshot)                                                                                                                                                                                                                           |
| # of Existing Revenue Lines added in the selected snapshot period         | The total Existing Revenue Lines added to the selected time period when the snapshot was taken. Note: This data is for the selected snapshot period. e.g. If Q2 is the snapshot quarter chosen, the existing revenue lines added in Q2 will be shown.                                                                                                                                                                                                                                                                                                                                           |
| # of Revenue Lines added in the selected snapshot period                  | The total Revenue Lines added to the selected time period when the snapshot was taken. Note: This data is for the selected snapshot period. e.g. If Q2 is the snapshot quarter chosen, the total revenue lines added in Q2 will be shown.                                                                                                                                                                                                                                                                                                                                                       |
| # of times Revenue Line Amount Changed                                    | The total number of times the Revenue Line Expected Amount has been changed till the end of the selected snapshot period. e.g. If Q2 is the snapshot quarter selected, and if the revenue amount has been changed 10 times in total during the lifetime of the Revenue Line, and 2 times in Q2, then this will show 10 and not the count of date changes in the chosen snapshot period.                                                                                                                                                                                                         |

| Metric                                   | Metric Definition                                                                                                                                                                                                                                                                                                                                                                               |
|------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| # of times Revenue Line Amount Increased | The total number of times the Revenue Line Expected Amount has been increased till the end of the selected snapshot period. e.g. If Q2 is the snapshot quarter selected, and if the revenue amount has been increased 10 times in total during the lifetime of the Revenue Line, and 2 times in Q2, then this will show 10 and not the count of amount increases in the chosen snapshot period. |
| # of times Revenue Line Amount Decreased | The total number of times the Revenue Line Expected Amount has been decreased till the end of the selected snapshot period. e.g. If Q2 is the snapshot quarter selected, and if the revenue amount has been decreased 10 times in total during the lifetime of the Revenue Line, and 2 times in Q2, then this will show 10 and not the count of amount decreases in the chosen snapshot period. |

## CX - Opportunity Snapshot

This table describes the Opportunity Snapshot Metrics.

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

| Metric                                            | Metric Definition                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|---------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Average Age of Won Opportunities                  | Average Age of Won Opportunities. This metric is computed as follows: Total Won Opportunities Age/# of Won Opportunities                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| Average Opportunity Win Probability               | Average probability to Win the Opportunity. This metric is computed as follows: Total win probabilities/# of 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: $100 * \text{Total Competitive Won Opportunities} / \text{Total Competitive Opportunities}$                                                                                                                                                                                                                                                                                                                                                                                                                              |
| Competitor Win Rate                               | Rate of Winning Competitive Opportunities. This metric is computed as follows: $100 * \text{Total Competitive Won Opportunities} / \text{Total Competitive Won and Lost Opportunities}$                                                                                                                                                                                                                                                                                                                                                                                                                    |
| Conversion Rate                                   | Rate of Converting Opportunities. This metric is computed as follows: $100 * \text{Total Won Opportunities} / \text{Total Opportunities}$                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| Loss Rate                                         | Rate of Losing Opportunities. This metric is computed as follows: $100 * \text{Total Lost Opportunities} / \text{Total Won and Lost Opportunities}$                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| Win Rate                                          | Rate of Winning Opportunities. This metric is computed as follows: $100 * \text{Total Won Opportunities} / \text{Total Won and Lost Opportunities}$                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| # of Changes to Expected Enterprise Close Date    | The total number of times the Opportunity Expected Close Date has been changed in its lifecycle till the end of the selected snapshot period. e.g. If Q2 is the snapshot quarter selected, and if the Date has been changed 10 times in total during the lifetime of the Opportunity, and 2 times in Q2, then this will show 10 and not the count of Date changes only in the chosen snapshot period. (Note - this depends on the snapshot frequency e.g. If the snapshot frequency is weekly, and there are multiple changes done before the weekly snapshot is taken, those cannot be captured)          |
| # of Changes to Expected Enterprise Close Period  | The total number of times the Opportunity Expected Close Period has been changed in its lifecycle till the end of the selected snapshot period. e.g. If Q2 is the snapshot quarter selected, and if the Period has been changed 10 times in total during the lifetime of the Opportunity, and 2 times in Q2, then this will show 10 and not the count of Period changes only in the chosen snapshot period. (Note - this depends on the snapshot frequency e.g. If the snapshot frequency is weekly, and there are multiple changes done before the weekly snapshot is taken, those cannot be captured)    |
| # of Changes to Expected Enterprise Close Quarter | The total number of times the Opportunity Expected Close Quarter has been changed in its lifecycle till the end of the selected snapshot period. e.g. If Q2 is the snapshot quarter selected, and if the Quarter has been changed 10 times in total during the lifetime of the Opportunity, and 2 times in Q2, then this will show 10 and not the count of Quarter changes only in the chosen snapshot period. (Note - this depends on the snapshot frequency e.g. If the snapshot frequency is weekly, and there are multiple changes done before the weekly snapshot is taken, those cannot be captured) |

| Metric                                                                    | Metric Definition                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|---------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| # of Changes to Expected Enterprise Close Year                            | The total number of times the Opportunity Expected Close Year has been changed in its lifecycle till the end of the selected snapshot period. e.g. If Q2 is the snapshot quarter selected, and if the Year has been changed 10 times in total during the lifetime of the Opportunity, and 2 times in Q2, then this will show 10 and not the count of Year changes only in the chosen snapshot period. (Note - this depends on the snapshot frequency e.g. If the snapshot frequency is weekly, and there are multiple changes done before the weekly snapshot is taken, those cannot be captured) |
| # of Opportunities moved out in the selected snapshot period              | The total Opportunities moved out of the selected snapshot period. Note: This data is for the selected snapshot period. e.g. If Q1 is the snapshot quarter chosen, only those revenue lines that were moved out in Q1 will be shown.                                                                                                                                                                                                                                                                                                                                                              |
| # of Opportunities moved out by 1 period in the selected snapshot period  | The total Opportunities moved out by 1 period from the selected snapshot period. Note: This data is for the selected snapshot period. e.g. If Q1 is the snapshot quarter chosen, only those revenue lines that were moved out in Q1 to Q2 will be shown.                                                                                                                                                                                                                                                                                                                                          |
| # of Opportunities moved out by 2 periods in the selected snapshot period | The total Opportunities moved out by 2 periods from the selected snapshot period. Note: This data is for the selected snapshot period. e.g. If Q1 is the snapshot quarter chosen, only those revenue lines that were moved out in Q1 to Q3 will be shown.                                                                                                                                                                                                                                                                                                                                         |
| # of Opportunities moved out by 3 periods in the selected snapshot period | The total Opportunities moved out by 3 periods from the selected snapshot period. Note: This data is for the selected snapshot period. e.g. If Q1 is the snapshot quarter chosen, only those revenue lines that were moved out in Q1 to Q4 will be shown.                                                                                                                                                                                                                                                                                                                                         |
| # of Opportunities added in the selected snapshot period                  | The total Opportunities added in the selected snapshot period. Note: This data is for the selected snapshot period. e.g. If Q1 is the snapshot quarter chosen, only those Opportunities that were added in Q1 will be shown.                                                                                                                                                                                                                                                                                                                                                                      |
| # of New Opportunities added in the selected snapshot period              | The total New Opportunities added in the selected snapshot period. Note: This data is for the selected snapshot period. e.g. If Q1 is the snapshot quarter chosen, only those New Opportunities that were added in Q1 will be shown. (When a snapshot is scheduled newly, all the Opportunities would show up as New Opportunities for the first snapshot)                                                                                                                                                                                                                                        |
| # of Existing Opportunities added in the selected snapshot period         | The total Existing Opportunities added in the selected snapshot period. Note: This data is for the selected snapshot period. e.g. If Q1 is the snapshot quarter chosen, only those Existing Opportunities from other quarters and added in Q1 will be shown. Any new Opportunities created during Q1 period will not be included here.                                                                                                                                                                                                                                                            |

## 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                                                                                                                         |
|------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------|
| % Opportunities by Stage           | The % of Opportunities in a stage of the total Opportunities                                                                              |
| % Progressed                       | The Progressed Opportunity Percentage. This metric is computed as follows: # of Progressed Opportunities/# of Opportunities Across Stages |
| 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           |
| Conversion Rate                    | The rate of converting Opportunities. This metric is computed as follows: 100 * # of Won Opportunities/# of Opportunities                 |
| Loss Rate                          | The rate of losing Opportunities. This metric is computed as follows: 100 * # of Lost opportunities/# of Won+Lost Opportunities           |
| Win Rate                           | The rate of winning Opportunities. This metric is computed as follows: 100 * # of Won opportunities/# of Won+Lost Opportunities           |

## CX - Service Request

This table describes the Service Request Metrics.

| Metric                               | Metric Definition                                                                                        |
|--------------------------------------|----------------------------------------------------------------------------------------------------------|
| # of Closed Critical SRs             | The total number of Critical SRs that are in Closed status (status = Closed)                             |
| # of Closed SRs                      | The total number of Closed SRs (status = Closed)                                                         |
| # of Critical SRs                    | The total number of Critical SRs                                                                         |
| # of High Severity SRs               | The total number of High severity SRs (severity = High)                                                  |
| # of In Progress Critical SRs        | The total number of Critical SRs that are In Progress status                                             |
| # of In Progress SRs                 | The total number of in progress SRs (status = In Progress)                                               |
| # 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                                                   |
| # 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 New Critical SRs                | The total number of Critical SRs that are in New status                                                  |
| # of New SRs                         | The total number of new SRs (status = New)                                                               |
| # of Open Critical SRs               | The total number of Critical SRs that are Open (status = In Progress, New and Waiting)                   |
| # 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 Open SRs                        | The total number of Open SRs (status = In Progress, New and Waiting)                                     |
| # of Raw SRs                         | The total SRs in the system including the deleted ones (delete flag = Y)                                 |
| # of Reopened SRs                    | The total number of SRs that are Reopened                                                                |
| # of Resolved Critical SRs           | The total number of Critical SRs that are Resolved (status = Resolved)                                   |
| # of Resolved SRs                    | The total number of SRs that are Resolved (status = Resolved)                                            |

| Metric                                    | Metric Definition                                                                                                                                                |
|-------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| # of SRs                                  | The total number of SRs                                                                                                                                          |
| # of SRs Pending Agent Action             | The total number of SRs assigned to an Agent having status as In Progress or New                                                                                 |
| # 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 SRs Resolved in under 24 hrs         | The total number of SRs that were resolved in under 24 hours after they were opened                                                                              |
| # of SRs Transferred                      | Number of SR's that were transferred                                                                                                                             |
| # of Transfers                            | Number of times the SR's were transferred                                                                                                                        |
| # of Unassigned SRs                       | The total number of SRs that have not been assigned                                                                                                              |
| # of Waiting Critical SRs                 | The total number of Critical SRs that are in Queue and waiting to be assigned (status = Waiting)                                                                 |
| # of Waiting SRs                          | The total number of SRs that are in Queue and waiting to be assigned (status = Waiting)                                                                          |
| % 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 |
| % SRs Transferred                         | The total percentage of SR's that were transferred. This metric is computed as follows: 100*(# of SRs Transferred/# of SRs)                                      |
| Average # of Transfers                    | The average number of times SR's were transferred. This metric is computed as follows: (# of Transfers/# of SRs Transferred)                                     |
| Average Open SR Age (Days)                | The average number of days a SRs is Open                                                                                                                         |
| 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                                                                                                                           |
| Open SR Age (Days)                        | # of days since the SR was reported (doesn't apply for Closed/Resolved SRs)                                                                                      |
| SR Resolution Rate                        | The SRs Resolution rate. This metric is computed as follows: $100 * \frac{\text{\# of Resolved} + \text{\# of Closed SRs}}{\text{\# of SRs}}$                    |
| 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 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 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                                                                                                                        |

| Metric                        | Metric Definition                            |
|-------------------------------|----------------------------------------------|
| 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 |

## CX - Service Request Lifecycle

This table describes the B2B Service Request Lifecycle metrics.

| Metric                                         | Metric Definition                                                                                                                                                                                   |
|------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| # of Distinct SR Assignees                     | The number of distinct resources an SR has been assigned to.                                                                                                                                        |
| # of Distinct SR Queues Assigned               | The number of distinct Queues the SR has been assigned to. (The initial Queue assignment is also counted).                                                                                          |
| # of Raw SRs (Lifecycle)                       | The total number of SRs tracked for Lifecycle changes, including the deleted SRs..                                                                                                                  |
| # of SR Lifecycle Changes                      | The total updates made to the SR (changes to Status, Severity, Queue assignment, and Resource Assignment).                                                                                          |
| # of SR Queue Assignments                      | The number of Queues the SR has been assigned to. (The initial Queue assignment and multiple assignments to the same queue is counted ).                                                            |
| # of SR Reopen Events                          | The number of times an SR has been reopened (after being resolved).                                                                                                                                 |
| # of SR Resource Assignments                   | The number of resources an SR has been assigned to (multiple assignments to the same resource are counted).                                                                                         |
| # of SR Status Change Events                   | The number of times (occurrences) the SR status changes..                                                                                                                                           |
| # of SRs (Lifecycle)                           | The total number of SRs tracked for Lifecycle changes.                                                                                                                                              |
| Average # of Distinct SR Assignees             | The average number of distinct SR Assignees. This metric is calculated as follows: # of Distinct SR Assignees / # of SRs with at least one assignee.                                                |
| Average # of Distinct SR Queues Assigned       | The average number of distinct SR Queues. This metric is calculated as follows: # of Distinct SR Queues Assigned / # of SRs with Queue.                                                             |
| Average # of SR Queue Assignments              | The average number of SR Queues. This metric is calculated as follows: # of SR Queues Assigned / # of SRs with Queue.                                                                               |
| Average # of SR Resource Assignments           | The average number of SR Resource Assignments. This metric is calculated as follows: # of SR Resource Assignments / # of SRs with at least one assignee.                                            |
| Average Duration as High Severity SR (Days)    | The total Duration as High Severity SR (Days) averaged over # of High Severity SRs. This metric is calculated as follows: Total Duration as High Severity SR (Days) / # of High Severity SRs.       |
| Average Duration as High Severity SR (Hours)   | The total Duration as High Severity SR (Hours) averaged over # of High Severity SRs. This metric is calculated as follows: Total Duration as High Severity SR (Hours) / # of High Severity SRs.     |
| Average Duration as High Severity SR (Minutes) | The total Duration as High Severity SR (Minutes) averaged over # of High Severity SRs. This metric is calculated as follows: Total Duration as High Severity SR (Minutes) / # of High Severity SRs. |
| Average Duration as In Progress SR (Days)      | The total Duration as In Progress SR (Days) averaged over # of In Progress SRs. This metric is calculated as follows: Total Duration as In Progress SR (Days) / # of In Progress SRs.               |

| Metric                                                 | Metric Definition                                                                                                                                                                                                        |
|--------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Average Duration as In Progress SR (Hours)             | The total Duration as In Progress SR (Hours) averaged over # of In Progress SRs. This metric is calculated as follows: Total Duration as In Progress SR (Hours) / # of In Progress SRs.                                  |
| Average Duration as In Progress SR (Minutes)           | The total Duration as In Progress SR (Minutes) averaged over # of In Progress SRs. This metric is calculated as follows: Total Duration as In Progress SR (Minutes) / # of In Progress SRs.                              |
| Average Duration as Low Severity SR (Days)             | The total Duration as Low Severity SR (Days) averaged over # of Low Severity SRs. This metric is calculated as follows: Total Duration as Low Severity SR (Days) / # of Low Severity SRs.                                |
| Average Duration as Low Severity SR (Hours)            | The total Duration as Low Severity SR (Hours) averaged over # of Low Severity SRs. This metric is calculated as follows: Total Duration as Low Severity SR (Hours) / # of Low Severity SRs.                              |
| Average Duration as Low Severity SR (Minutes)          | The total Duration as Low Severity SR (Minutes) averaged over # of Low Severity SRs. This metric is calculated as follows: Total Duration as Low Severity SR (Minutes) / # of Low Severity SRs.                          |
| Average Duration as Medium Severity SR (Days)          | The total Duration as Medium Severity SR (Days) averaged over # of Medium Severity SRs. This metric is calculated as follows: Total Duration as Medium Severity SR (Days) / # of Medium Severity SRs.                    |
| Average Duration as Medium Severity SR (Hours)         | The total Duration as Medium Severity SR (Hours) averaged over # of Medium Severity SRs. This metric is calculated as follows: Total Duration as Medium Severity SR (Hours) / # of Medium Severity SRs.                  |
| Average Duration as Medium Severity SR (Minutes)       | The total Duration as Medium Severity SR (Minutes) averaged over # of Medium Severity SRs. This metric is calculated as follows: Total Duration as Medium Severity SR (Minutes) / # of Medium Severity SRs.              |
| Average Duration as New SR (Days)                      | The total Duration as New SR (Days) averaged over # of New SRs. This metric is calculated as follows: Total Duration as New SR (Days) / # of New SRs.                                                                    |
| Average Duration as New SR (Hours)                     | The total Duration as New SR (Hours) averaged over # of New SRs. This metric is calculated as follows: Total Duration as New SR (Hours) / # of New SRs.                                                                  |
| Average Duration as New SR (Minutes)                   | The total Duration as New SR (Minutes) averaged over # of New SRs. This metric is calculated as follows: Total Duration as New SR (Minutes) / # of New SRs.                                                              |
| Average Duration as Resolved SR until Reopen (Days)    | The total Duration as Resolved SR until Reopen (Days) averaged over # of re - opened SRs. This metric is calculated as follows: Total Duration as Resolved SR until Reopen (Days) / # of Resolved SR until Reopen.       |
| Average Duration as Resolved SR until Reopen (Hours)   | The total Duration as Resolved SR until Reopen (Hours) averaged over # of re - opened SRs. This metric is calculated as follows: Total Duration as Resolved SR until Reopen (Hours) / # of Resolved SR until Reopen.     |
| Average Duration as Resolved SR until Reopen (Minutes) | The total Duration as Resolved SR until Reopen (Minutes) averaged over # of re - opened SRs. This metric is calculated as follows: Total Duration as Resolved SR until Reopen (Minutes) / # of Resolved SR until Reopen. |

| Metric                                               | Metric Definition                                                                                                                                                                                                                                                                                                               |
|------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Average Duration as Waiting SR (Days)                | The total Duration as Waiting SR (Days) averaged over # of Waiting SRs. This metric is calculated as follows: Total Duration as Waiting SR (Days) / # of Waiting SRs.                                                                                                                                                           |
| Average Duration as Waiting SR (Hours)               | The total Duration as Waiting SR (Hours) averaged over # of Waiting SRs.. This metric is calculated as follows: Total Duration as Waiting SR (Hours) / # of Waiting SRs.                                                                                                                                                        |
| Average Duration as Waiting SR (Minutes)             | The total Duration as Waiting SR (Minutes) averaged over # of Waiting SRs. This metric is calculated as follows: Total Duration as Waiting SR (Minutes) / # of Waiting SRs.                                                                                                                                                     |
| Average Duration in SR Queue (Days)                  | The total Duration in SR Queue (Days) averaged over # of SRs that have traversed that queue. This metric is calculated as follows: Total Duration in SR Queue (Days) / # of SRs in Queue .                                                                                                                                      |
| Average Duration in SR Queue (Hours)                 | The total Duration in SR Queue (Hours) averaged over # of SRs that have traversed that queue. This metric is calculated as follows: Total Duration in SR Queue (Hours) / # of SRs in Queue .                                                                                                                                    |
| Average Duration in SR Queue (Minutes)               | The total Duration in SR Queue (Days) averaged over # of SRs that have traversed that queue. This metric is calculated as follows: Total Duration in SR Queue (Minutes) / # of SRs in Queue .                                                                                                                                   |
| Average Duration of SR Lifecycle Change (Days)       | The average duration in days that an SR is with a particular status / severity / queue / resource. The metric assumes meaning seen in context of one of status, severity, queue or resource. This metric is calculated as follows: Total Duration of SR Lifecycle Change (Days) / # of SRs tracked for Lifecycle changes.       |
| Average Duration of SR Lifecycle Change (Hours)      | The average duration in hours that an SR is with a particular status / severity / queue / resource. The metric assumes meaning seen in context of one of status, severity, queue or resource. This metric is calculated as follows: Total Duration of SR Lifecycle Change (Hours) / # of SRs tracked for Lifecycle changes.     |
| Average Duration of SR Lifecycle Change (Minutes)    | The average duration in minutes that an SR is with a particular status / severity / queue / resource. The metric assumes meaning seen in context of one of status, severity, queue or resource. This metric is calculated as follows: Total Duration of SR Lifecycle Change (Minutes) / # of SRs tracked for Lifecycle changes. |
| Average Duration SR Unassigned to Assignee (Days)    | The total duration an SR is Unassigned to any Assignee (Days). This metric is calculated as follows: Total Duration SR Unassigned to Assignee (Days) / # of SRs not assigned to an Assignee (SRs where the Assignee field is blank).                                                                                            |
| Average Duration SR Unassigned to Assignee (Hours)   | The total duration an SR is Unassigned to any Assignee (Hours). This metric is calculated as follows: Total Duration SR Unassigned to Assignee (Hours) / # of SRs not assigned to an Assignee (SRs where the Assignee field is blank).                                                                                          |
| Average Duration SR Unassigned to Assignee (Minutes) | The total duration an SR is Unassigned to any Assignee (Minutes). This metric is calculated as follows: Total Duration SR Unassigned to Assignee (Minutes) / # of SRs not assigned to an Assignee (SRs where the Assignee field is blank).                                                                                      |
| Average Duration SR Unassigned to Queue (Days)       | The total duration an SR is Unassigned to any Queue (Days). This metric is calculated as follows: Total Duration SR Unassigned to Queue (Days) / # of SRs not assigned to a Queue (SRs where the Queue field is blank).                                                                                                         |

| Metric                                            | Metric Definition                                                                                                                                                                                                             |
|---------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Average Duration SR Unassigned to Queue (Hours)   | The total duration an SR is Unassigned to any Queue (Hours). This metric is calculated as follows: Total Duration SR Unassigned to Queue (Hours) / # of SRs not assigned to a Queue (SRs where the Queue field is blank).     |
| Average Duration SR Unassigned to Queue (Minutes) | The total duration an SR is Unassigned to any Queue (Minutes). This metric is calculated as follows: Total Duration SR Unassigned to Queue (Minutes) / # of SRs not assigned to a Queue (SRs where the Queue field is blank). |
| Average Duration with SR Assignee (Days)          | The total Duration with SR Assignee (Days) averaged over # of SRs assigned to the resource at least once. This metric is calculated as follows: Total Duration with SR Assignee (Days) / # of SRs with Assignees.             |
| Average Duration with SR Assignee (Hours)         | The total Duration with SR Assignee (Hours) averaged over # of SRs assigned to the resource at least once. This metric is calculated as follows: Total Duration with SR Assignee (Hours) / # of SRs with Assignees.           |
| Average Duration with SR Assignee (Minutes)       | The total Duration with SR Assignee (Minutes) averaged over # of SRs assigned to the resource at least once. This metric is calculated as follows: Total Duration with SR Assignee (Minutes) / # of SRs with Assignees.       |
| Maximum Change End Date                           | The End time of association of an SR with a tracked attribute such as Assignee, Queue, Severity, Status or Status Type..                                                                                                      |
| Minimum Change Start Date                         | The Start time of association of an SR with a tracked attribute such as Assignee, Queue, Severity, Status or Status Type..                                                                                                    |
| Total Duration as High Severity SR (Days)         | The total duration in days that SR Severity is High (Sev Code = ORA_SVC_SEV1).                                                                                                                                                |
| Total Duration as High Severity SR (Hours)        | The total duration in hours that SR Severity is High (Sev Code = ORA_SVC_SEV1).                                                                                                                                               |
| Total Duration as High Severity SR (Minutes)      | The total duration in minutes that SR Severity is High (Sev Code = ORA_SVC_SEV1).                                                                                                                                             |
| Total Duration as In Progress SR (Days)           | The total duration in days that an SR is in any status that belongs to 'In Progress' Status Type..                                                                                                                            |
| Total Duration as In Progress SR (Hours)          | The total duration in hours that an SR is in any status that belongs to 'In Progress' Status Type..                                                                                                                           |
| Total Duration as In Progress SR (Minutes)        | The total duration in minutes that an SR is in any status that belongs to 'In Progress' Status Type..                                                                                                                         |
| Total Duration as Low Severity SR (Days)          | The total duration in days that SR Severity is Low (Sev Code = ORA_SVC_SEV3).                                                                                                                                                 |
| Total Duration as Low Severity SR (Hours)         | The total duration in hours that SR Severity is Low (Sev Code = ORA_SVC_SEV3).                                                                                                                                                |
| Total Duration as Low Severity SR (Minutes)       | The total duration in minutes that SR Severity is Low (Sev Code = ORA_SVC_SEV3).                                                                                                                                              |
| Total Duration as Medium Severity SR (Days)       | The total duration in days that SR Severity is Medium (Sev Code = ORA_SVC_SEV2).                                                                                                                                              |
| Total Duration as Medium Severity SR (Hours)      | The total duration in hours that SR Severity is Medium (Sev Code = ORA_SVC_SEV2).                                                                                                                                             |
| Total Duration as Medium Severity SR (Minutes)    | The total duration in minutes that SR Severity is Medium (Sev Code = ORA_SVC_SEV2).                                                                                                                                           |
| Total Duration as New SR (Days)                   | The total duration in days that an SR is in any status that belongs to 'New' Status Type..                                                                                                                                    |
| Total Duration as New SR (Hours)                  | The total duration in hours that an SR is in any status that belongs to 'New' Status Type..                                                                                                                                   |

| Metric                                               | Metric Definition                                                                                                                                                                                   |
|------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Total Duration as New SR (Minutes)                   | The total duration in minutes that an SR is in any status that belongs to 'New' Status Type..                                                                                                       |
| Total Duration as Resolved SR until Reopen (Days)    | The total duration in days that an SR is in any status that belongs to 'Resolved' Status type until it was reopened. (applicable only for a reopened SR).                                           |
| Total Duration as Resolved SR until Reopen (Hours)   | The total duration in hours that an SR is in any status that belongs to 'Resolved' Status type until it was reopened. (applicable only for a reopened SR).                                          |
| Total Duration as Resolved SR until Reopen (Minutes) | The total duration in minutes that an SR is in any status that belongs to 'Resolved' Status type until it was reopened. (applicable only for a reopened SR).                                        |
| Total Duration as Waiting SR (Days)                  | The total duration in days that an SR is in any status that belongs to 'Waiting' Status Type..                                                                                                      |
| Total Duration as Waiting SR (Hours)                 | The total duration in hours that an SR is in any status that belongs to 'Waiting' Status Type..                                                                                                     |
| Total Duration as Waiting SR (Minutes)               | The total duration in minutes that an SR is in any status that belongs to 'Waiting' Status Type..                                                                                                   |
| Total Duration in SR Queue (Days)                    | The total duration in days that an SR stays in any specific queue.                                                                                                                                  |
| Total Duration in SR Queue (Hours)                   | The total duration in hours that an SR stays in any specific queue.                                                                                                                                 |
| Total Duration in SR Queue (Minutes)                 | The total duration in minutes that an SR stays in any specific queue.                                                                                                                               |
| Total Duration of SR Lifecycle Change (Days)         | The total duration in days that an SR is resident in a specific status / severity / queue / resource. The metric assumes meaning seen in context of one of status, severity, queue or resource..    |
| Total Duration of SR Lifecycle Change (Hours)        | The total duration in hours that an SR is resident in a specific status / severity / queue / resource. The metric assumes meaning seen in context of one of status, severity, queue or resource..   |
| Total Duration of SR Lifecycle Change (Minutes)      | The total duration in minutes that an SR is resident in a specific status / severity / queue / resource. The metric assumes meaning seen in context of one of status, severity, queue or resource.. |
| Total Duration SR Unassigned to Assignee (Days)      | The total duration in days that an SR is not assigned to any resource. (Assignee field is blank).                                                                                                   |
| Total Duration SR Unassigned to Assignee (Hours)     | The total duration in hours that an SR is not assigned to any resource. (Assignee field is blank).                                                                                                  |
| Total Duration SR Unassigned to Assignee (Minutes)   | The total duration in hours that an SR is not assigned to any resource. (Assignee field is blank).                                                                                                  |
| Total Duration SR Unassigned to Queue (Days)         | The total duration in days that an SR is not assigned to any Queue. (Queue field is blank).                                                                                                         |
| Total Duration SR Unassigned to Queue (Hours)        | The total duration in hours that an SR is not assigned to any Queue. (Queue field is blank).                                                                                                        |
| Total Duration SR Unassigned to Queue (Minutes)      | The total duration in minutes that an SR is not assigned to any Queue. (Queue field is blank).                                                                                                      |
| Total Duration with SR Assignee (Days)               | The total duration in days that an SR stays with any specific resource / assignee.                                                                                                                  |
| Total Duration with SR Assignee (Hours)              | The total duration in hours that an SR stays with any specific resource / assignee.                                                                                                                 |
| Total Duration with SR Assignee (Minutes)            | The total duration in minutes that an SR stays with any specific resource / assignee.                                                                                                               |

| Metric                                            | Metric Definition                                                                                                                                                                                                                                                                                                               |
|---------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Average Duration of SR Lifecycle Change (Minutes) | The average duration in minutes that an SR is with a particular status / severity / queue / resource. The metric assumes meaning seen in context of one of status, severity, queue or resource. This metric is calculated as follows: Total Duration of SR Lifecycle Change (Minutes) / # of SRs tracked for Lifecycle changes. |
| Minimum Change Start Date                         | The Start time of association of an SR with a tracked attribute such as Assignee, Queue, Severity, Status or Status Type.                                                                                                                                                                                                       |
| Maximum Change End Date                           | The End time of association of an SR with a tracked attribute such as Assignee, Queue, Severity, Status or Status Type.                                                                                                                                                                                                         |
| # of Raw SRs (Lifecycle)                          | The total number of SRs tracked for Lifecycle changes, including the deleted SRs.                                                                                                                                                                                                                                               |

## CX - Service Request Milestone

This table describes the B2B Service Request Milestone metrics.

| Metric                              | Metric Definition                                                                                                                                                                   |
|-------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| # of Active Milestones              | The total SR Active Milestones (does not include the Milestones in Cancelled status)                                                                                                |
| # of Cancelled Milestones           | The total SR Milestones that are in Cancelled status. (Milestone status = Cancelled)                                                                                                |
| # of Completed Compliant Milestones | The total Milestones that have been Completed and are Compliant (Milestone status = Complete and Compliance Flag = Y)                                                               |
| # of Completed Expired Milestones   | The total Milestones that have been completed and Expired (Milestone status = Complete and Compliance Flag = N)                                                                     |
| # of Completed Milestones           | The total Milestones that have been completed (Milestone status = Complete)                                                                                                         |
| # of Compliant Milestones           | The total Compliant Milestones (Milestone Status not equal to Cancelled and Compliance Flag not equal to N)                                                                         |
| # of Expired Milestones             | The total Expired Milestones (Milestone Status not equal to Cancelled and Compliance Flag = N)                                                                                      |
| # of Milestones                     | The total SR Milestones including the Milestones in Cancelled status                                                                                                                |
| # of Overdue Time Milestones        | The total non-compliant/Overdue Milestones. (Compliance Flag = N). Canceled Milestones are also included in this metric.                                                            |
| # of Raw SRs (Milestone)            | The total number of SRs with Milestones including the deleted SRs.                                                                                                                  |
| # of SRs                            | The total number of SRs with Milestones                                                                                                                                             |
| % Completed Compliant Milestones    | The percentage of Completed Compliant milestones. This metric is calculated as follows: $100 * (\# \text{ of Completed Compliant Milestones} / \# \text{ of Completed Milestones})$ |
| % Completed Expired Milestones      | The percentage of Completed Expired Milestones. This metric is calculated as follows: $100 * (\# \text{ of Completed Expired Milestones} / \# \text{ of Completed Milestones})$     |
| % Completed Milestones              | The percentage of Completed Milestones. This metric is calculated as follows: $100 * (\# \text{ of Completed Milestones} / \# \text{ of Active Milestones})$                        |

| Metric                                  | Metric Definition                                                                                                                                                                                                                                            |
|-----------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| % Compliant Milestones                  | The percentage of Compliant Milestones. This metric is calculated as follows: $100 * (\# \text{ of Compliant Milestones} / \# \text{ of Active Milestones})$                                                                                                 |
| % Expired Milestones                    | The percentage of Expired Milestones. This metric is calculated as follows: $100 * (\# \text{ of Expired Milestones} / \# \text{ of Active Milestones})$                                                                                                     |
| Average of Overdue Time (Minutes)       | The total time elapsed in minutes since the SR Milestone was due averaged over a number of overdue time Milestones. Applies for non-compliant milestones.                                                                                                    |
| Overdue Time (Minutes)                  | The total time elapsed in minutes since the SR Milestone was due. Applies for non-compliant milestones.                                                                                                                                                      |
| # of First Response Compliant SRs       | The total SRs that have the compliant first response milestone i.e. whose First Response milestone has been met.                                                                                                                                             |
| # of Resolution Compliant SRs           | The total Resolved Compliant SRs i.e. whose Resolution milestone has been met.                                                                                                                                                                               |
| # of SRs with First response Violations | The total SRs with first-response violations i.e. whose First Response milestone has not been met.                                                                                                                                                           |
| # of SRs with Resolution Violations     | The total SRs with Resolution violations i.e. whose Resolution milestone has not been met.                                                                                                                                                                   |
| % First Response Compliant SRs          | The percentage of the first response SRs that are compliant. This metric is calculated as follows: $100 * (\# \text{ of First Response Compliant SRs} / (\# \text{ of First Response Compliant SRs} + \# \text{ of SRs with First Response Violations}))$    |
| % Resolution Compliant SRs              | The percentage of the Resolution SRs that are compliant. This metric is calculated as follows: $100 * (\# \text{ of Resolution Compliant SRs} / (\# \text{ of Resolution Compliant SRs} + \# \text{ of SRs with Resolution Violations}))$                    |
| % SRs with First Response Violations    | The percentage of the SRs with first-response violations. This metric is calculated as follows: $100 * (\# \text{ of SRs with First response Violations} / (\# \text{ of First Response Compliant SRs} + \# \text{ of SRs with First Response Violations}))$ |
| % SRs with Resolution Violations        | The percentage of the SRs with Resolution violations. This metric is calculated as follows: $100 * (\# \text{ of SRs with Resolution Violations} / (\# \text{ of Resolution Compliant SRs} + \# \text{ of SRs with Resolution Violations}))$                 |

## CX - Subscription Bill Line

This table describes the Subscription Bill Line metrics. These metrics are used in the Document Currency (DC) and Analytics Currency (AC) fact folders in this subject area.

Document Currency is the currency used while entering the data in the application. Analytics Currency is the currency defined in the application. Analytics Currency and Exchange Rate Type are configured during product implementation. The Exchange Rate date basis uses the Subscription Start Date to convert to the 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     |

| Metric                                  | Metric Definition                                 |
|-----------------------------------------|---------------------------------------------------|
| 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 - Subscription Historical Trend

This table describes the Subscription Historical Trend metrics. These metrics are used in the Document Currency (DC) and Analytics Currency (AC) fact folders in this subject area.

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

| Metric                                      | Metric Definition                                                                                                                                                      |
|---------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| # of Active Customers - Period Start        | The total Active customers at the start of a period (Customers with an active subscription in a given period)                                                          |
| # of Active Subscriptions - Period Start    | The total number of Active Subscriptions at the start of a period                                                                                                      |
| Active MRR - Period Start                   | The total monthly recurring revenue of all Active Subscriptions at the start of a period                                                                               |
| Average Revenue per Customer - Period Start | The total Average Revenue per Customer (ARPU) at the start of a period. This metric is computed as follows: Total Active MRR/Total number of Active Customers          |
| Product Net Price (TCV) - Period Start      | The total Product Net Price of Active Subscriptions at the start of a period                                                                                           |
| # of Active Customers - Period End          | The total Active customers at the end of a period (Customers with an active subscription in a given period)                                                            |
| # of Active Subscriptions - Period End      | The total number of Active Subscriptions at the end of a period                                                                                                        |
| Active MRR - Period End                     | The total Monthly Recurring Revenue of all Active Subscriptions at the end of a period                                                                                 |
| Average Revenue per Customer - Period End   | The total Average Revenue per Customer (ARPU) at the end of a period. This metric is computed as follows: Total Active MRR/Total number of Active Customers            |
| Product Net Price (TCV) - Period End        | The total Product Net Price of Active Subscriptions at the end of a period                                                                                             |
| # of New Active Subscriptions               | The number of New Subscriptions started in a period. (Started in a period and which aren't a result of an amendment, suspension, or renewal of existing subscriptions) |
| # of Renewed Active Subscriptions           | The number of Subscriptions Renewed in a period. (Number of active subscriptions that are renewed from existing subscriptions)                                         |

| Metric                                              | Metric Definition                                                                                                                                                                                                                                                               |
|-----------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| # of Terminated Subscriptions                       | The number of Subscriptions Terminated in a period. (Number of active subscriptions that are terminated in a period. This metric doesn't include closed subscriptions due to the amendment or suspension of existing subscriptions)                                             |
| # of Due for Renewal Subscriptions                  | The number of Subscriptions that are due for Renewal in a period.                                                                                                                                                                                                               |
| # of Expansion Subscriptions                        | The total Expansion Subscriptions (Target subscription MRR greater than Source Subscription MRR).                                                                                                                                                                               |
| # of Contraction Subscriptions                      | The total number of Expansion Subscriptions (Target subscription MRR less than Source Subscription MRR).                                                                                                                                                                        |
| # of Churned Renewal Subscription                   | The total Churned Renewal Subscriptions in a period. (Subscriptions that were Renewed from existing Subscriptions but Canceled in the given period)                                                                                                                             |
| # of Lapsed Renewal Subscriptions                   | The total Lapsed Renewal Subscriptions in a period. (Active subscriptions that expired in a period without being renewed).                                                                                                                                                      |
| New Active MRR                                      | The total new MRR of Active subscriptions added in a period. (Started in a period and which aren't a result of an amendment, suspension, or renewal of existing subscriptions)                                                                                                  |
| Activated Renewal MRR                               | The total Activated Renewal MRR in a period. (Active Subscriptions that were renewed from existing subscriptions)                                                                                                                                                               |
| Termination MRR                                     | The total Termination MRR in a period. (Active subscriptions that are closed in a period, not due to the amendment or suspension of existing subscriptions)                                                                                                                     |
| MRR Due for Renewal                                 | The total MRR of Subscriptions that are due for Renewal in a period                                                                                                                                                                                                             |
| Expansion MRR                                       | The total Expansion MRR in a period. (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)                                                     |
| Contraction MRR                                     | The total Contraction MRR in a period. (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)                                                   |
| Churned Renewal MRR                                 | The total Churned Renewal MRR in a period. (Subscriptions that were Renewed from existing Subscriptions but Canceled in the given period)                                                                                                                                       |
| Lapsed Renewal MRR                                  | The total Lapsed Renewal MRR in a period. (Active subscriptions that expired in a period without being renewed)                                                                                                                                                                 |
| Product Net Price (TCV) - Contraction Subscriptions | The Product Net Price (TCV) due to Contraction in a period (The difference in Product Net Price (TCV) between a target and source of an amendment relationship where the target TCV less than Source TCV and the target start date falls within this period and not in Draft).  |
| Product Net Price (TCV) - Expansion Subscriptions   | The Product Net Price (TCV) due to Expansion in a period (The difference in Product Net Price (TCV) between a target and source of an amendment relationship where the target TCV greater than Source TCV and the target start date falls within this period and not in Draft). |
| Product Net Price (TCV) - New Active Subscriptions  | The total Product Net Price of the New Subscriptions started in a period (started in a period and which aren't a result of an amendment, suspension, or renewal of existing subscriptions).                                                                                     |

| Metric                                                  | Metric Definition                                                                                                                                                                                                                                                    |
|---------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Product Net Price (TCV) - Renewed Active Subscriptions  | The total Product Net Price of the Renewed Subscriptions in a period (number of active subscriptions that are renewed from existing subscriptions).                                                                                                                  |
| Product Net Price (TCV) - Terminated Subscriptions      | The total Product Net Price of the Subscriptions Terminated in a period (number of active subscriptions that are terminated in a period). This metric does not include TCV of the closed subscriptions due to the amendment or suspension of existing subscriptions. |
| Product Net Price (TCV) - Due for Renewal               | The total Product Net Price of Subscriptions that are due for Renewal in a period.                                                                                                                                                                                   |
| Product Net Price (TCV) - Churned Renewal Subscriptions | The total Product Net Price of the Churned Renewal Subscriptions in a period (Subscriptions that were Renewed from existing Subscriptions but Canceled in the given period).                                                                                         |
| Product Net Price (TCV) - Lapsed Renewal Subscriptions  | The total Product Net Price of the Lapsed Renewal Subscriptions in a period (Active subscriptions that expired in a period without being renewed).                                                                                                                   |
| Absolute MRR Churn                                      | The Absolute MRR Churn. This metric is calculated as follows: (Lapsed Renewal MRR + Termination MRR + Churned Renewal MRR)                                                                                                                                           |
| # of New Customers                                      | The number of New Customers added in a period. (Customers who started an active subscription in a given period)                                                                                                                                                      |
| # of Churned Customers                                  | The number of Customers Churned in a period (Customers whose active subscriptions were all terminated or expired without renewal in a given period)                                                                                                                  |
| New Customer MRR                                        | The total MRR of a new Customer added in a period (started in a period and which aren't a result of an amendment, suspension, or renewal of existing subscriptions).                                                                                                 |
| Product Net Price (TCV) - New Customers                 | The total Product Net Price of the New Customers added in a period (Customers who started an active subscription in a given period)                                                                                                                                  |
| Change in # of Active Customers                         | The change in the number of Active Customers in a given period. This metric is calculated as follows: # of Active Customers (Period End) - # of Active Customers (Period start)                                                                                      |
| Change in # of Active Subscriptions                     | The change in the Number of Subscriptions in a given period. This metric is calculated as follows: Number of active subscriptions (Period End) - Number of active subscriptions (Period Start)                                                                       |
| Change in Active MRR                                    | The change in Active MRR in a given period. This metric is calculated as follows: Active MRR (Period End) - Active MRR (Period Start)                                                                                                                                |
| Change in Average Revenue per Customer                  | The change in Average Revenue per Customer in a given Period. This metric is calculated as follows: Average Revenue per customer (Period End) - Average Revenue per customer (Period Start)                                                                          |
| Change in Product Net Price                             | The change in the Product Net Price in a given period. This metric is calculated as follows: Product Net Price (Period End) - Product Net Price (Period Start)                                                                                                       |
| Customers Churn Rate %                                  | The Customer Churn Rate. This metric is calculated as follows: # of Churned Customers / # of Active Customers (period start)                                                                                                                                         |

| Metric                       | Metric Definition                                                                                                                                                                                                                |
|------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| MRR Churn Rate %             | The MRR Churn Rate. This metric is calculated as follows:<br>$100 * (\text{Lapsed Renewal MRR} + \text{Termination MRR} + \text{Churned Renewal MRR}) / \text{Active MRR (Period Start)}$                                        |
| MRR Lapsed Renewal %         | The MRR Lapsed Renewal Rate. This metric is calculated as follows:<br>$100 * \text{Lapsed Renewal MRR} / \text{MRR Due for Renewal}$                                                                                             |
| MRR Renewal Rate %           | The MRR Renewal Rate. This metric is calculated as follows:<br>$100 * \text{Activated Renewal MRR} / \text{MRR due for Renewal (Period End)}$                                                                                    |
| Net Revenue Retention Rate % | The Net Revenue Retention Rate. This metric is calculated as follows:<br>$100 * \text{Active MRR (Period End)} / \text{Active MRR (Period Start)}$                                                                               |
| # of Expired Subscriptions   | The total number of Subscriptions Expired in a period (Started as Active while entering in the Period, and Expired without being Renewed by the end of the Period, and also includes the Subscriptions marked as 'Do Not Renew') |

## CX - Subscriptions

This table describes the Subscription Metrics.

| Metric                                            | Metric Definition                                                                                                                                             |
|---------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|
| # of Active Subscription Downgrades               | The total Downgraded Subscriptions (amend reason = ORA_DOWNGRADE) that are Active                                                                             |
| # of Active Subscription Upgrades                 | The total Upgraded Subscriptions (amend reason = ORA_UPGRADE) that are Active                                                                                 |
| # of Active Subscriptions                         | The total Active Subscriptions                                                                                                                                |
| # of Active Subscriptions Added - Last 30 days    | The total Subscriptions Added in the last 30 days that are Active                                                                                             |
| # of Active Subscriptions Expiring - Next 30 days | The total Active Subscriptions Expiring in the next 30 days                                                                                                   |
| # of Customers                                    | The total Customers                                                                                                                                           |
| # of Customers with Active Subscriptions          | The total customers with at least one Active Subscription                                                                                                     |
| # 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 Expired Subscriptions                        | The total Expired Subscriptions                                                                                                                               |
| # 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 Products                                     | The total Products                                                                                                                                            |
| # of Products with Active Subscriptions           | The total Products that have Active Subscriptions                                                                                                             |
| # of Subscription Downgrades                      | The total Downgraded Subscriptions (amend reason = ORA_DOWNGRADE)                                                                                             |
| # of Subscription Upgrades                        | The total Upgraded Subscriptions (amend reason = ORA_UPGRADE)                                                                                                 |
| # of Subscriptions                                | The total Subscriptions                                                                                                                                       |
| # of Subscriptions Expired - Last 30 days         | The total Subscriptions Expired in the last 30 days                                                                                                           |
| # of Terminated Subscriptions                     | The total terminated subscriptions                                                                                                                            |
| # Renewed Active Subscriptions                    | The total Renewed Subscriptions that are Active                                                                                                               |

| Metric                                  | Metric Definition                                                                                                                                                                                                                                 |
|-----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| # Renewed Subscriptions                 | The total Renewed Subscriptions                                                                                                                                                                                                                   |
| Activated Renewal MRR                   | The total Activated Renewal MRR (Active Subscriptions that were renewed from existing subscriptions)                                                                                                                                              |
| Active Subscription MRR                 | The total Monthly Recurring Revenue for Active Subscription                                                                                                                                                                                       |
| 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                                                                                                              |
| 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) |
| Early Termination Fee                   | Early Termination Fee                                                                                                                                                                                                                             |
| 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) |
| First Active MRR                        | The total new MRR of Active subscriptions (which aren't a result of an amendment, suspension, or renewal of existing subscriptions)                                                                                                               |
| Subscription Cancelled Amount           | The total Subscription Cancelled Amount                                                                                                                                                                                                           |
| Subscription Closed Amount              | The total Subscription Closed Amount                                                                                                                                                                                                              |
| Subscription Credited Amount            | The total Subscription Credited Amount                                                                                                                                                                                                            |
| Subscription Invoiced Amount            | The total Subscription Invoiced Amount                                                                                                                                                                                                            |
| Subscription MRR                        | The total Monthly Recurring Revenue                                                                                                                                                                                                               |
| Subscription Total Contract Value (TCV) | The total Subscription Contract Value                                                                                                                                                                                                             |

## SF - Activity (Preview)

This table describes the Activity metrics.

| Metric                     | Metric Definition                                                                                                                                                                                   |
|----------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| # of Activities            | The total number of Activities (includes Tasks and Events together)                                                                                                                                 |
| # of Open Activities       | The total number of Open Activities (includes Open Tasks and Open Events together). Note: For Events, if the Event Activity End Date >= Current Date, then it is considered as Open                 |
| # of Completed Activities  | The total number of Completed Activities (includes Completed Tasks and Completed Events together). Note: For Events, if the Event Activity End Date < Current Date, then it is considered as Closed |
| # of Activity Tasks        | The total number of Activity Tasks                                                                                                                                                                  |
| # of Open Activity Tasks   | The total number of Open Activity Tasks                                                                                                                                                             |
| # of Closed Activity Tasks | The total number of Closed (Completed) Activity Tasks                                                                                                                                               |
| # of Activity Events       | The total number of Activity Events                                                                                                                                                                 |
| # of Open Activity Events  | The total number of Open Activity Events. This is calculated as follows: If Event Activity End Date >= Current Date, then it is considered as Open                                                  |

| Metric                                    | Metric Definition                                                                                                                                        |
|-------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------|
| # of Closed Activity Events               | The total number of Completed Activity Events. This is calculated as follows: If Event Activity End Date < Current Date, then it is considered as Closed |
| # of Recurring Activity Events            | The total number of Recurring Activity Events                                                                                                            |
| # of Activity Public Events               | The total number of Public Activity Events                                                                                                               |
| # of Activity Group Events                | The total number of Group Activity Events                                                                                                                |
| Activity Event Duration (minutes)         | The total Activity Events duration in minutes                                                                                                            |
| Activity Event Duration (hours)           | The total Activity Events duration in Hours                                                                                                              |
| Average Activity Event Duration (minutes) | The Average Activity Events duration in minutes. This is calculated as follows: Total Activity Event Duration (minutes) / # of Activity Events           |
| Average Activity Event Duration (hours)   | The Average Activity Events duration in hours. This is calculated as follows: Total Activity Event Duration (Hours) / # of Activity Events               |

## SF - Campaign Influence (Preview)

This table describes Salesforce Campaign Influence metrics.

These metrics are used in the Document Currency (DC) and Corporate Currency (CC) fact folders in the subject area. Document Currency is the currency used while entering the data in the application. Corporate Currency is the currency defined in Salesforce CRM. Metrics in these folders show amounts in their respective currencies.

| Metric                                          | Metric Definition                                                                                                                                                                     |
|-------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| # of Campaigns with Influence                   | The total number of Campaigns that Influenced the Opportunities                                                                                                                       |
| # of Influenced Opportunities                   | The total number of Opportunities influenced by Campaigns                                                                                                                             |
| # of Influenced Won Opportunities               | The total number of Won Opportunities influenced by Campaigns                                                                                                                         |
| Influenced Opportunity Revenue                  | The total Campaign Influenced Opportunity Revenue                                                                                                                                     |
| Influenced Won Opportunity Revenue              | The total Campaign Influenced Won Opportunity Revenue                                                                                                                                 |
| Average Influenced Opportunity Percentage Share | The percentage of the associated Opportunity's Amount field attributed to the associated Campaign                                                                                     |
| Campaign Expected Revenue                       | The total Campaign Opportunity Expected Revenue                                                                                                                                       |
| Campaign Actual Cost                            | The total Campaign Cost                                                                                                                                                               |
| Campaign ROI                                    | The Campaign ROI is based on the Campaign Influence Model. This metric is calculated as follows: (Influenced Opportunity Revenue - SF Campaign Actual Cost) / SF Campaign Actual Cost |
| Average Campaign Cost per Opportunity           | The total Campaign Cost per Opportunity. This metric is calculated as follows: SF Campaign Actual Cost / # of Influenced Opportunities                                                |
| Average Campaign Cost per Won Opportunity       | The total Campaign Cost per Won Opportunity. This metric is calculated as follows: SF Campaign Actual Cost / # of Influenced Won Opportunities                                        |
| Average Campaign Cost per Influenced Revenue    | The total Campaign Cost per Influenced Revenue. This metric is calculated as follows: SF Campaign Actual Cost / Influenced Opportunity Revenue                                        |

| Metric                                  | Metric Definition                                                                                                                                 |
|-----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------|
| Average Campaign Influenced Won Revenue | The average Won Opportunity Revenue. This metric is calculated as follows: Influenced Won Opportunity Revenue / # of Influenced Won Opportunities |

## SF - Campaign Members (Preview)

This table describes the Salesforce Campaign Member metrics.

| Metric                                 | Metric Definition                                                   |
|----------------------------------------|---------------------------------------------------------------------|
| Campaign Actual Cost                   | The total Campaign Actual Cost                                      |
| Campaign Budgeted Cost                 | The total Campaign Budgeted Cost                                    |
| Campaign Expected Revenue              | The total Campaign Expected Revenue                                 |
| # of Campaign Members targeted         | The total Campaign Members targeted as part of the Campaign         |
| # of Contacts targeted                 | The total Contacts targeted as part of the Campaign                 |
| # of Leads targeted                    | The total Leads targeted as part of the Campaign                    |
| # of Accounts targeted                 | The total Accounts targeted as part of the Campaign                 |
| # of Leads targeted that got Converted | The total targeted Leads as part of the Campaign that got Converted |
| # of Campaign Responses                | The total Responses                                                 |
| # Sent in Campaigns                    | The total Email Sent in Campaign                                    |
| # of Active Campaigns with Members     | The total number of Active Campaigns with Campaign Members          |
| # of Campaigns with Members            | The total number of Campaigns with Campaign Members                 |

## SF - Lead Activity (Preview)

This table describes the Salesforce Lead Activity metrics.

| Metric                          | Metric Definition                                                                                                                                                                                               |
|---------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| # of Lead Activities            | The total number of Activities associated with Leads (Includes Task and Events). These are the Activities created for Leads                                                                                     |
| # of Lead Open Activities       | The total number of Open Activities associated with Leads (Includes Open Task and Open Events) Note: For Events, if the Event Activity End Date >= Current Date, then it is considered as Open.                 |
| # of Lead Closed Activities     | The total number of Completed activities associated with Leads (Includes Completed Task and Completed Events) Note: For Events, if the Event Activity End Date < Current Date, then it is considered as Closed. |
| # of Converted Lead Activities  | The total number of Activities for Converted Leads                                                                                                                                                              |
| Activity Rate - Leads           | The rate of Activities for Leads. This metric is computed as follows: $1 * \# \text{ of Lead Activities} / \# \text{ of Leads with Activities}$                                                                 |
| Activity Rate - Converted Leads | The rate of Activities for Converted Leads. This metric is computed as follows: $1 * \# \text{ of } \# \text{ of Converted Lead Activities} / \# \text{ of Converted Leads with Activities}$                    |
| # of Lead Tasks                 | The total number of Lead Activity Tasks. These are the Tasks created for Leads                                                                                                                                  |

| Metric                                                               | Metric Definition                                                                                                                                                                                                |
|----------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| # of Lead Open Activity Tasks                                        | The total number of Lead Activity Tasks that are Open                                                                                                                                                            |
| # of Lead Closed Activity Tasks                                      | The total number of Lead Activity Tasks that are Closed                                                                                                                                                          |
| # of Lead Events                                                     | The total number of Lead Activity Events. These are the Events created for Leads                                                                                                                                 |
| # of Lead Open Activity Events                                       | The total number of Lead Activity Events that are Open.<br>Note: For Events, if the Event Activity End Date >= Current Date, then it is considered as Open                                                       |
| # of Lead Closed Activity Events                                     | The total number of Lead Activity Events that are Closed.<br>Note: For Events, if the Event Activity End Date < Current Date, then it is considered as Closed                                                    |
| Lead Activity Event Duration (hours)                                 | The total Lead Activity Event duration in hours                                                                                                                                                                  |
| Lead Activity Event Duration (minutes)                               | The total Lead Activity Eventduration in minutes                                                                                                                                                                 |
| Average Lead Activity Event Duration (minutes) for Closed Activities | The Average Lead Activity Events duration in minutes for Closed Activities. This is calculated as follows: Total Lead Activity Event Duration (minutes) for Closed Activities / # of Lead Closed Activity Events |
| Average Lead Activity Event Duration (hours) for Closed Activities   | The Average Lead Activity Events duration in hours for Closed Activities. This is calculated as follows: Total Lead Activity Event Duration (hours) for Closed Activities / # of Lead Closed Activity Events     |
| Average Lead Activity Event Duration (minutes) for Open Activities   | The Average Lead Activity Events duration in minutes for Open Activities. This is calculated as follows: Total Lead Activity Event Duration (minutes) for Open Activities / # of Lead Open Activity Events       |
| Average Lead Activity Event Duration (hours) for Open Activities     | The Average Lead Activity Events duration in hours for Open Activities. This is calculated as follows: Total Lead Activity Event Duration (hours) for Open Activities / # of Lead Open Activity Events           |

## SF - Leads (Preview)

This table describes the Salesforce Lead metrics.

| Metric                              | Metric Definition                                                                                                                                |
|-------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------|
| # of Leads                          | The total number of Leads                                                                                                                        |
| # of Converted Leads                | The total number of Converted Leads                                                                                                              |
| # of Leads Converted to Opportunity | The total number of Leads converted to Opportunity                                                                                               |
| Lead Conversion (%)                 | Ratio of Converted Leads to the Total Leads. This metric is computed as follows: # of Converted Leads / # of Leads                               |
| Lead to Opportunity Conversion (%)  | Ratio of Leads Converted to Opportunity to the Total Leads. This metric is computed as follows: # of Converted Leads to Opportunity / # of Leads |

## SF - Opportunity (Preview)

This table describes the Opportunity metrics.

These metrics are used in the Document Currency (DC) and Corporate Currency (CC) fact folder in this subject area. Document Currency is the currency used while entering the data in the application. Corporate Currency is the currency defined in Salesforce CRM. Metrics in these folders show amounts in their respective currencies.

| Metric                              | Metric Definition                                                                                                                                                                                                                                  |
|-------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| # of Opportunities                  | The total number of Active Opportunities                                                                                                                                                                                                           |
| # of Opportunities with Products    | The total number of Opportunities with Product Lines (SF Opportunity Has Products Flag = True)                                                                                                                                                     |
| # of Split Opportunities            | The total number of Split Opportunities (Opportunity IsSplit is True)                                                                                                                                                                              |
| # of Open Opportunities             | The total number of Open Opportunities (SF Opportunity Is Closed = False)                                                                                                                                                                          |
| # of Closed Opportunities           | The total number of Closed Opportunities (SF Opportunity Is Closed = True)                                                                                                                                                                         |
| # of Won Opportunities              | The total number of Won Opportunities (SF Opportunity Is Won = True)                                                                                                                                                                               |
| # of Lost Opportunities             | The total number of Lost Opportunities (SF Opportunity Is Won = False, SF Opportunity Is Closed = True)                                                                                                                                            |
| Opportunity Amount                  | The total Opportunity Amount                                                                                                                                                                                                                       |
| Open Opportunity Amount             | The total Open Opportunity Amount (SF Opportunity Is Closed = False)                                                                                                                                                                               |
| Closed Opportunity Amount           | The total Closed Opportunity Amount (SF Opportunity Is Closed = True)                                                                                                                                                                              |
| Won Opportunity Amount              | The total Won Opportunity Amount (SF Opportunity Is Won = True)                                                                                                                                                                                    |
| Lost Opportunity Amount             | The total Lost Opportunity Amount (SF Opportunity Is Won = False, SF Opportunity Is Closed = True)                                                                                                                                                 |
| Opportunity Expected Amount         | The total Opportunity Expected Amount (Opportunity Amount * SF Opportunity Probability (%))                                                                                                                                                        |
| Average # of Days Open              | The average number of days the Opportunity is Open                                                                                                                                                                                                 |
| Average # of Days to Close          | The average number of days to Close the Opportunity                                                                                                                                                                                                |
| Average Days Since Last Activity    | The average number of days since the last completed event or task for the record. This metric is calculated as follows: (Days Since Last Activity / # of Opportunities) Note: Days Since Last Activity = Current date minus the Last Activity Date |
| Average Age of Opportunities        | The average Age of the Opportunities                                                                                                                                                                                                               |
| Average Age of Closed Opportunities | The average Age of the Closed Opportunities                                                                                                                                                                                                        |
| Average Age of Won Opportunities    | The average Age of the Won Opportunities                                                                                                                                                                                                           |
| Average Age of Lost Opportunities   | The average Age of the Lost Opportunities                                                                                                                                                                                                          |
| Win Rate                            | Rate of Winning Opportunities. This metric is computed as follows: $100 * \text{Total Won Opportunities} / \text{Total Won} + \text{Lost Opportunities}$                                                                                           |
| Loss Rate                           | Rate of Losing Opportunities. This metric is computed as follows: $100 * \text{Total Lost Opportunities} / \text{Total Won} + \text{Lost Opportunities}$                                                                                           |
| Conversion Rate                     | Rate of Converting Opportunities. This metric is computed as follows: $100 * \text{Total Won Opportunities} / \text{Total Opportunities}$                                                                                                          |
| # of Raw Opportunities              | The total number of Opportunities including the deleted Opportunities                                                                                                                                                                              |
| Raw Opportunity Amount              | The total Opportunity Amount including the deleted Opportunities                                                                                                                                                                                   |
| # of Opportunity Splits             | The total number of Splits of the Opportunities. Note: This would count splits across split types e.g. Revenue, Overlay etc.                                                                                                                       |
| Opportunity Split Amount            | The total Opportunity Split Amount. Note: This would count splits across split types e.g. Revenue, Overlay etc.                                                                                                                                    |

| Metric                            | Metric Definition                                                                                                                                                                       |
|-----------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Open Opportunity Split Amount     | The total Open Opportunity Split Amount on the Open Opportunity ( SF Opportunity Is Closed = False )                                                                                    |
| Closed Opportunity Split Amount   | The total Closed Opportunity Split Amount on the Closed Opportunity ( SF Opportunity Is Closed = True )                                                                                 |
| Won Opportunity Split Amount      | The total Won Opportunity Split Amount on the Won Opportunity ( SF Opportunity Is Won = True )                                                                                          |
| Lost Opportunity Split Amount     | The total Lost Opportunity Split Amount on the Lost Opportunity ( SF Opportunity Is Won = False, SF Opportunity Is Closed = True )                                                      |
| Opportunity Split Expected Amount | The total Opportunity Split Expected Revenue ( Opportunity Split Amount * SF Opportunity Probability (%) ). Note: This would count splits across split types e.g. Revenue, Overlay etc. |
| Average Open Opportunity Amount   | The average Open Opportunity Amount. This metric is calculated as: Open Opportunity Amount/# of Open Opportunities                                                                      |
| Average Won Opportunity Amount    | The average Won Opportunity Amount. This metric is calculated as: Won Opportunity Amount/# of Won Opportunities                                                                         |
| Average Lost Opportunity Amount   | The average Lost Opportunity Amount. This metric is calculated as: Lost Opportunity Amount/# of Lost Opportunities                                                                      |

## SF - Opportunity Activity (Preview)

This table describes the Salesforce Opportunity Activity metrics.

| Metric                               | Metric Definition                                                                                                                                                                                                       |
|--------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| # of Opportunity Activities          | The total number of Activities associated with Opportunities (Includes Task and Events). These are the Activities created for Opportunity                                                                               |
| # of Opportunity Open Activities     | The total number of Open Activities associated with Opportunities (Includes Open Task and Open Events). Note: For Events, if the Event Activity End Date >= Current Date, then it is considered as Open                 |
| # of Opportunity Closed Activities   | The total number of Completed activities associated with Opportunities (Includes Completed Task and Completed Events). Note: For Events, if the Event Activity End Date < Current Date, then it is considered as Closed |
| Activity Rate - Opportunities        | The rate of Activities for Opportunities. This metric is computed as follows: $1 * \# \text{ of Opportunity Activities} / \# \text{ of Opportunities with Activities}$                                                  |
| Activity Rate - Open Opportunities   | The rate of Activities for Open Opportunities. This metric is computed as follows: $1 * \# \text{ of Activities for Open Opportunities} / \# \text{ of Open Opportunities with Activities}$                             |
| Activity Rate - Won Opportunities    | The rate of Activities for Won Opportunities. This metric is computed as follows: $1 * \# \text{ of Activities for Won Opportunities} / \# \text{ of Won Opportunities with Activities}$                                |
| # of Opportunity Activity Tasks      | The total number of Opportunity Activity Tasks. These are the Tasks created for Opportunity                                                                                                                             |
| # of Opportunity Open Activity Tasks | The total number of Opportunity Activity Tasks that are Open                                                                                                                                                            |

| Metric                                                                      | Metric Definition                                                                                                                                                                                                                     |
|-----------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| # of Opportunity Closed Activity Tasks                                      | The total number of Opportunity Activity Tasks that are Closed                                                                                                                                                                        |
| # of Opportunity Activity Events                                            | The total number of Opportunity Activity Events. These are the Events created for Opportunity                                                                                                                                         |
| # of Opportunity Open Activity Events                                       | The total number of Opportunity Activity Events that are Open Note: For Events, if the Event Activity End Date >= Current Date, then it is considered as Open.                                                                        |
| # of Opportunity Closed Activity Events                                     | The total number of Opportunity Activity Events that are Closed Note: For Events, if the Event Activity End Date < Current Date, then it is considered as Closed.                                                                     |
| Opportunity Activity Event Duration (minutes)                               | The total Opportunity Activity Events duration in minutes                                                                                                                                                                             |
| Opportunity Activity Event Duration (hours)                                 | The total Opportunity Activity Events duration in Hours                                                                                                                                                                               |
| Average Opportunity Activity Event Duration (minutes) for Closed Activities | The Average Opportunity Activity Events duration in minutes for Closed Activities. This is calculated as follows: Total Opportunity Activity Event Duration (minutes) for Closed Activities / # of Opportunity Closed Activity Events |
| Average Opportunity Activity Event Duration (hours) for Closed Activities   | The Average Opportunity Activity Events duration in hours for Closed Activities. This is calculated as follows: Total Opportunity Activity Event Duration (hours) for Closed Activities / # of Opportunity Closed Activity Events     |
| Average Opportunity Activity Event Duration (minutes) for Open Activities   | The Average Opportunity Activity Events duration in minutes for Open Activities. This is calculated as follows: Total Opportunity Activity Event Duration (minutes) for Open Activities / # of Opportunity Open Activity Events       |
| Average Opportunity Activity Event Duration (hours) for Open Activities     | The Average Opportunity Activity Events duration in hours for Open Activities. This is calculated as follows: Total Opportunity Activity Event Duration (hours) for Open Activities / # of Opportunity Open Activity Events           |

## SF - Opportunity Historical Trend (Preview)

This table describes the Salesforce Opportunity Historical Trend metrics.

These metrics are used in the Document Currency (DC) and Corporate Currency (CC) fact folders in the subject area. Document Currency is the currency used while entering the data in the application. Corporate Currency is the currency defined in Salesforce CRM. Metrics in these folders show amounts in their respective currencies.

| Metric                    | Metric Definition                                                                                                                                          |
|---------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------|
| # of Opportunities        | The total number of Opportunities at the end of the selected snapshot day/period/quarter/year                                                              |
| # of Open Opportunities   | The total number of Open Opportunities at the end of the selected snapshot day/period/quarter/year (SF Opportunity Is Closed = False)                      |
| # of Closed Opportunities | The total number of Closed Opportunities at the end of the selected snapshot day/period/quarter/year (SF Opportunity Is Closed = True)                     |
| # of Won Opportunities    | The total number of Won Opportunities at the end of the selected snapshot day/period/quarter/year (SF Opportunity Is Won = True)                           |
| # of Lost Opportunities   | The total number of Lost Opportunities at the end of the selected day/period/quarter/year (SF Opportunity Is Won = False, SF Opportunity Is Closed = True) |

| Metric                              | Metric Definition                                                                                                                                                                                                                                                                                                                                 |
|-------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Opportunity Amount                  | The total Opportunity Amount at the end of the selected snapshot day/period/quarter/year                                                                                                                                                                                                                                                          |
| Open Opportunity Amount             | The total Open Opportunity Amount at the end of the selected snapshot day/period/quarter/year (SF Opportunity Is Closed = False)                                                                                                                                                                                                                  |
| Closed Opportunity Amount           | The total Closed Opportunity Amount at the end of the selected snapshot day/period/quarter/year (SF Opportunity Is Closed = True)                                                                                                                                                                                                                 |
| Won Opportunity Amount              | The total Won Opportunity Amount at the end of the selected snapshot day/period/quarter/year (SF Opportunity Is Won = True)                                                                                                                                                                                                                       |
| Lost Opportunity Amount             | The total Lost Opportunity Amount at the end of the selected snapshot day/period/quarter/year (SF Opportunity Is Won = False, SF Opportunity Is Closed = True)                                                                                                                                                                                    |
| Opportunity Expected Amount         | The total Opportunity Expected Amount at the end of the selected snapshot day/period/quarter/year (Opportunity Amount * SF Opportunity Probability (%))                                                                                                                                                                                           |
| Average # of Days Open              | The total number of days the Opportunity is Open at the end of the selected snapshot day/period/quarter/year                                                                                                                                                                                                                                      |
| Average # of Days to Close          | The total number of days to Close the Opportunity at the end of the selected snapshot day/period/quarter/year                                                                                                                                                                                                                                     |
| # of Opportunities with Products    | The total number of Opportunities with Product Lines at the end of the selected snapshot day/period/quarter/year (SF Opportunity Has Products Flag = True)                                                                                                                                                                                        |
| # of Split Opportunities            | The total number of Split Opportunities at the end of the selected snapshot day/period/quarter/year (Opportunity IsSplit is True)                                                                                                                                                                                                                 |
| Average Age of Opportunities        | The Average Age of the Opportunities at the end of the selected snapshot day/period/quarter/year                                                                                                                                                                                                                                                  |
| Average Age of Closed Opportunities | The Average Age of the Closed Opportunities at the end of the selected snapshot day/period/quarter/year                                                                                                                                                                                                                                           |
| Average Age of Won Opportunities    | The Average Age of the Won Opportunities at the end of the selected snapshot day/period/quarter/year                                                                                                                                                                                                                                              |
| Average Age of Lost Opportunities   | The Average Age of the Lost Opportunities at the end of the selected snapshot day/period/quarter/year                                                                                                                                                                                                                                             |
| # of Raw Opportunities              | The total number of Opportunities including the deleted Opportunities at the end of the selected snapshot day/period/quarter/year                                                                                                                                                                                                                 |
| Raw Opportunity Amount              | The total Opportunity Amount including the deleted Opportunities at the end of the selected snapshot day/period/quarter/year                                                                                                                                                                                                                      |
| Win Rate                            | Rate of Winning Opportunities at the end of the period. This metric is computed as follows: $100 * \text{Total Won Opportunities} / \text{Total Won+Lost Opportunities}$ . Note: The Win Rate calculation considers all the won opportunities at the end of the selected snapshot period (and not during the selected snapshot period).           |
| Loss Rate                           | Rate of Losing Opportunities at the end of the selected snapshot period. This metric is computed as follows: $100 * \text{Total Lost Opportunities} / \text{Total Won+Lost Opportunities}$ . Note: The Loss rate calculation considers all the won opportunities at the end of the selected period (and not during the selected snapshot period). |

| Metric                                | Metric Definition                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|---------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Conversion Rate                       | Rate of Converting Opportunities at the end of the selected snapshot period. This metric is computed as follows: $100 * \text{Total Won Opportunities} / \text{Total Opportunities}$ . Note: The Conversion Rate calculation considers all the won opportunities at the end of the selected period (and not during the selected snapshot period).                                                                                                                                                       |
| Average Won Opportunity Amount        | The Average Won Opportunity Amount. This is calculated as follow: $\text{Won Opportunity Amount} / \# \text{ of Won Opportunities}$                                                                                                                                                                                                                                                                                                                                                                     |
| Average Opportunity Amount            | The Average Opportunity Amount. This is calculated as follow: $\text{Opportunity Amount} / \# \text{ of Opportunities}$                                                                                                                                                                                                                                                                                                                                                                                 |
| # of Changes to Close Date            | The total number of times the Opportunity Close Date has been changed in its lifecycle till the end of the selected snapshot day/period/quarter/year. e.g. If Q2 is the snapshot quarter selected, and if the Date has been changed 10 times in total during the lifetime of the Opportunity, and 2 times in Q2, then this will show 10 and not the count of Date changes only in the chosen snapshot period i.e Q2. Note: If multiple changes are done daily, it will be counted as 1.                 |
| # of Changes to Fiscal Close Period   | The total number of times the Opportunity Fiscal Close Period has been changed in its lifecycle till the end of the selected snapshot day/period/quarter/year. e.g. If Q2 is the snapshot quarter selected, and if the Period has been changed 10 times in total during the lifetime of the Opportunity, and 2 times in Q2, then this will show 10 and not the count of Period changes only in the chosen snapshot period i.e Q2. Note: If multiple changes are done daily, it will be counted as 1.    |
| # of Changes to Fiscal Close Quarter  | The total number of times the Opportunity Fiscal Close Quarter has been changed in its lifecycle till the end of the selected snapshot day/period/quarter/year. e.g. If Q2 is the snapshot quarter selected, and if the Quarter has been changed 10 times in total during the lifetime of the Opportunity, and 2 times in Q2, then this will show 10 and not the count of Quarter changes only in the chosen snapshot period i.e Q2. Note: If multiple changes are done daily, it will be counted as 1. |
| # of Changes to Fiscal Close Year     | The total number of times the Opportunity Fiscal Close Year has been changed in its lifecycle till the end of the selected snapshot day/period/quarter/year. e.g. If Q2 is the snapshot quarter selected, and if the Year has been changed 10 times in total during the lifetime of the Opportunity, and 2 times in Q2, then this will show 10 and not the count of Year changes only in the chosen snapshot period i.e Q2. Note: If multiple changes are done daily, it will be counted as 1.          |
| # of times Opportunity Amount Changed | The total number of times the Opportunity Amount has been changed till the end of the selected snapshot day/period/quarter/year. e.g. If Q2 is the snapshot quarter selected, and if the revenue amount has been changed 10 times in total during the lifetime of the Revenue Line, and 2 times in Q2, then this will show 10 and not the count of date changes in the chosen snapshot period i.e Q2. Note: If multiple changes are done daily, it will be counted as 1.                                |

| Metric                                  | Metric Definition                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|-----------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| # of times Opportunity Amount Increased | The total number of times the Opportunity Amount has been increased till the end of the selected snapshot day/period/ quarter/year. e.g. If Q2 is the snapshot quarter selected, and if the revenue amount has been increased 10 times in total during the lifetime of the Revenue Line, and 2 times in Q2, then this will show 10 and not the count of amount increases in the chosen snapshot period i.e Q2. Note: If multiple changes are done daily, it will be counted as 1. |
| # of times Opportunity Amount Decreased | The total number of times the Opportunity Amount has been decreased till the end of the selected snapshot day/period/ quarter/year. e.g. If Q2 is the snapshot quarter selected, and if the revenue amount has been decreased 10 times in total during the lifetime of the Revenue Line, and 2 times in Q2, then this will show 10 and not the count of amount decreases in the chosen snapshot period i.e Q2. Note: If multiple changes are done daily, it will be counted as 1. |

## SF - Opportunity Line Item (Preview)

This table describes the Opportunity Revenue Line metrics.

These metrics are used in the Document Currency (DC) and Corporate Currency (CC) fact folder in this subject area. Document Currency is the currency used while entering the data in the application. Corporate Currency is the currency defined in Salesforce CRM. Metrics in these folders show amounts in their respective currencies.

| Metric                             | Metric Definition                                                                                                                    |
|------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------|
| # of Opportunity Line Items        | The total number of Opportunity Line Items                                                                                           |
| # of Open Opportunity Line Items   | The total number of Opportunity Line Items for Open Opportunities ( SF Opportunity Is Closed = False )                               |
| # of Closed Opportunity Line Items | The total number of Opportunity Line Items for Closed Opportunities ( SF Opportunity Is Closed = True )                              |
| # of Won Opportunity Line Items    | The total number of Opportunity Line Items for Won Opportunities ( SF Opportunity Is Won = True )                                    |
| # of Lost Opportunity Line Items   | The total number of Opportunity Line Items for Lost Opportunities ( SF Opportunity Is Won = False, SF Opportunity Is Closed = True ) |
| Line Item Amount                   | The total Amount on the Opportunity Line Item                                                                                        |
| Expected Line Item Amount          | The Expected Line Item Amount (This metric is calculated as Line Item Amount * Probability % / 100 )                                 |
| Open Line Item Amount              | The total Line Item Amount on the Open Opportunity Line Item                                                                         |
| Closed Line Item Amount            | The total Line Item Amount on the Closed Opportunity Line Item                                                                       |
| Won Line Item Amount               | The total Line Item Amount on the Won Opportunity Line Item                                                                          |
| Lost Line Item Amount              | The total Line Item Amount on the Lost Opportunity Line Item                                                                         |
| Opportunity Line Item Discount (%) | The total Line Item Discount on the Opportunity Line Item                                                                            |
| # of Raw Opportunity Line Items    | The total number of Opportunity Line Items including the deleted Line Items                                                          |
| Opportunity Amount                 | The total Opportunity (header) Amount                                                                                                |

| Metric                             | Metric Definition                                                                                                                                                                    |
|------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Raw Line Item Amount               | The total Amount on the Opportunity Line Item including the deleted Line Items                                                                                                       |
| Line Item Split Amount             | The total Line Item Split Amount. Note: This would count splits across split types e.g. Revenue, Overlay etc.                                                                        |
| Open Line Item Split Amount        | The total Line Item Split Amount on the Open Opportunity Line Item                                                                                                                   |
| Closed Line Item Split Amount      | The total Line Item Split Amount on the Closed Opportunity Line Item                                                                                                                 |
| Won Line Item Split Amount         | The total Line Item Split Amount on the Won Opportunity Line Item                                                                                                                    |
| Lost Line Item Split Amount        | The total Line Item Split Amount on the Lost Opportunity Line Item                                                                                                                   |
| Expected Line Item Split Amount    | The expected Line Item Split Amount Note: This would count splits across split types e.g. Revenue, Overlay etc.                                                                      |
| Line Item Schedule Amount          | The total Line Item Schedule Amount                                                                                                                                                  |
| Expected Line Item Schedule Amount | The total expected Line Item Schedule Amount                                                                                                                                         |
| Average Days Until Schedule Date   | The average number of days until the Scheduled date. This is calculated as follows: When the Current date is < Schedule date then ( Schedule date - current date in days ) else null |

## SF - Opportunity Stage Progression (Preview)

This table describes the Salesforce Opportunity Stage Progression metrics.

| Metric                             | Metric Definition                                                                                                                                            |
|------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------|
| # of Opportunities                 | The total number of Opportunities                                                                                                                            |
| # of Progressed Opportunities      | The total number of Opportunities progressed to a different stage                                                                                            |
| % Opportunities by Stage           | The percentage of Opportunities in a stage. This metric is calculated as follows: # of Opportunities / # of Opportunities Across Stages                      |
| % Progressed                       | The total % of Opportunities that moved stages. This metric is calculated as follows: # of Progressed Opportunities / # of Opportunities                     |
| Average # of Days in Stage         | The average number of days an opportunity spent in a particular sales stage. This metric is calculated 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                            |
| Conversion Rate                    | The rate of converting Opportunities. This metric is computed as follows: $100 * \# \text{ of Won Opportunities} / \# \text{ of Opportunities}$              |
| Win Rate                           | The rate of winning Opportunities. This metric is computed as follows: $100 * \# \text{ of Won opportunities} / \# \text{ of Won+Lost Opportunities}$        |
| Loss Rate                          | The rate of losing Opportunities. This metric is computed as follows: $100 * \# \text{ of Lost opportunities} / \# \text{ of Won+Lost Opportunities}$        |

## SF - Primary Campaign Influence (Preview)

This table describes Salesforce Primary Campaign Influence metrics.

These metrics are used in the Document Currency (DC) and Corporate Currency (CC) fact folders in the subject area. Document Currency is the currency used while entering the data in the application. Corporate Currency is the currency defined in Salesforce CRM. Metrics in these folders show amounts in their respective currencies.

| Metric                                               | Metric Definition                                                                                                                                                                           |
|------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| # of Campaigns with Influence                        | The total number of Campaigns that Influenced the Opportunities                                                                                                                             |
| # of Influenced Opportunities                        | The total number of Opportunities influenced by Campaigns                                                                                                                                   |
| # of Influenced Won Opportunities                    | The total number of Won Opportunities influenced by Campaigns                                                                                                                               |
| Primary Campaign Influenced Opportunity Revenue      | The total Primary Campaign Influenced Opportunity Revenue                                                                                                                                   |
| Primary Campaign Influenced Won Opportunity Revenue  | The total Primary Campaign Influenced Won Opportunity Revenue                                                                                                                               |
| Primary Campaign Expected Revenue                    | The total Campaign Opportunity Expected Revenue                                                                                                                                             |
| Primary Campaign Actual Cost                         | The total Campaign Cost                                                                                                                                                                     |
| Primary Campaign ROI                                 | The Campaign ROI using the Primary Campaign attribution model. This metric is calculated as follows: (Attributed Opportunities Revenue - SF Campaign Actual Cost) / SF Campaign Actual Cost |
| Average Primary Campaign Cost per Opportunity        | The total Campaign Cost per Opportunity. This metric is calculated as follows: SF Campaign Actual Cost / # of Opportunities                                                                 |
| Average Primary Campaign Cost per Won Opportunity    | The total Campaign Cost per Won Opportunity. This metric is calculated as follows: SF Campaign Actual Cost / # of Won Opportunities                                                         |
| Average Primary Campaign Cost per Attributed Revenue | The total Campaign Cost per Attributed Revenue. This metric is calculated as follows: SF Campaign Actual Cost / SF Primary Campaign Influenced Opportunity Revenue                          |
| Average Primary Campaign Won Revenue                 | The average Won Opportunity Revenue. This metric is calculated as follows: SF Primary Campaign Influenced Won Opportunity Revenue / # of Won Opportunities                                  |

# 9

## Prebuilt

### Overview

This chapter provides information on all the prebuilt business metrics, dashboards, and analyses that are shipped as the standard offering along with the product.

### Prebuilt Analyses

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

To access prebuilt data visualizations, go to **Shared Folders**, click **Oracle**, click **Fusion CX**, and then click **Detail Dashboards**.

### Common

#### Prebuilt Analyses

| Analyses Detail                             | Analyses Description                                                                                                                                          | Related Subject Areas                         |
|---------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------|
| Data Augmentation Summary                   | Provides an overview of created data augmentations, including warehouse and semantic components.                                                              | Common - Data Augmentation                    |
| Warehouse Refresh Statistics                | Provides insights into pipeline activity and performance.                                                                                                     | Common - Warehouse Refresh Statistics         |
| Data Validation                             | Provides results of data validations between Fusion Data Intelligence and Fusion Applications.                                                                | Common - Data Validation                      |
| Custom Data Usage                           | Provides daily and monthly views of custom data storage usage.                                                                                                | Common - Custom Data Usage Metrics            |
| Security Audit                              | Provides current and historical security assignments and security contexts.                                                                                   | Security Assignment<br>Security Audit History |
| Usage Tracking                              | Provide insights into system usage by analyzing user activities, and query performance.                                                                       | Common Usage Tracking                         |
| Content Explorer - Fusion Data Intelligence | Provides a view of business content, including subject areas, metrics, key metrics, and workbooks across the Fusion Data Intelligence analytics applications. |                                               |

### Activity Management

| Analyses Detail                            | Analyses Description                                                                                                                                                                                                                                      | Related Subject Areas     |
|--------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------|
| New Activities                             | Shows the number of activities created in the last 7 days, and provides a breakdown by different parameters such as creation date, activity type, and owner.                                                                                              | CX - Activity             |
| Number of Activities                       | Shows the 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 breakdown 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 Activities Rate                | Provides useful insights into the average number of activities being performed by a team member, and includes a breakdown based on different activity types.                                                                                              | CX - Activity             |
| Lead Activities Rate                       | Shows the number of activities performed on leads, and provides a breakdown based on leads status and activity date.                                                                                                                                      | CX - Lead Activity        |
| Opportunities Activities Rate              | Shows the number of activities performed on opportunities and provides a breakdown by opportunity outcome and status.                                                                                                                                     | CX - Opportunity Activity |
| Activity Rate - Won Opportunities          | Provides insights on the number of activities performed on opportunities that go on to win. This information helps businesses users understand the average number of activities needed to win an opportunity.                                             | CX - Opportunity Activity |
| Task Rate - Won Opportunities              | Provides insights on the number of tasks performed on opportunities that go on to win. This information helps businesses users understand how many tasks and which types of tasks contribute to an opportunity win.                                       | CX - Opportunity Activity |

## Lead Management

| Analyses Detail | Analyses Description                                                                                                                                                  | Related Subject Areas |
|-----------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|
| New Leads       | Shows the number of leads created in the last seven days, and provides a break down by different parameters such as creation date, origin, product, and account type. | CX - Leads            |
| Number of Leads | Shows the number of leads by creation date, status, product, account, and other lead-related attributes.                                                              | CX - Leads            |

| Analyses Detail              | Analyses Description                                                                                                                                                                               | Related Subject Areas |
|------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|
| Average Lead Age             | Shows the average lead age by lead status and lead creation period for the current quarter.                                                                                                        | CX - Leads            |
| Lead Qualification Rate      | Shows 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         | Shows 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 insight on which lead channels contribute to the 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 the highest number of wins and deal sizes.                                                                                                           | CX - Leads            |
| Lead Conversion Overview     | Shows the summary of lead conversion and how it trends over time.                                                                                                                                  | CX - Leads            |

## Marketing Campaigns

| Analyses Detail            | Analyses Description                                                                                                             | Related Subject Areas           |
|----------------------------|----------------------------------------------------------------------------------------------------------------------------------|---------------------------------|
| Campaign Activity Overview | Shows the Campaign Activity Summary and details of some of the key activities like Email, Form, Web, Landing Page, and External. | CX - Campaign Activity Analysis |

## 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 |

| Analyses Detail            | Analyses Description                                                                                                                                                                                                                                             | Related Subject Areas                                                      |
|----------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------|
| Sales Pipeline Velocity    | Shows the sales pipeline velocity for different quarters and the 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 the movement of opportunities through the sales stages in terms of total amounts and percentages.                                                                                                                                                          | CX - Opportunity Stage Progression                                         |
| Sales Cycle Analysis       | Provides insights into bottle necks in the sales cycle, and in which stages opportunities are 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 a more than 50% win probability are considered in the visualization.                                                                            | CX - Opportunity Stage Progression                                         |
| Sales Stage Velocity       | Provides insights into how quickly opportunities are moving through the sales funnel, as well as insights relative to their outcomes (won or lost).                                                                                                              | CX - Opportunity Stage Progression                                         |
| Sales Funnel Leakage       | Shows the sales stage from which opportunities are moving to closed from lost and how they compare to those that are moving from closed to 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 the open pipeline with the weighted pipeline by sales stage and closing quarter.                                                                                                                                                                        | CX - Opportunity Revenue Line                                              |
| Weighted Pipeline - Trend  | Shows trends of the weighted pipeline based on the 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. It 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. It also shows the 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. It also includes key conversion metrics such as revenue line loss rate percentage.                                                                                                           | CX - Opportunity Revenue Line Snapshot, CX - Opportunity Revenue Line      |
| Average Deal Size          | Provides a breakdown of average deal size by sales stage, opportunity owner, territory owner, and product/group.                                                                                                                                                 | CX - Opportunity Revenue Line                                              |

| Analyses Detail                       | Analyses Description                                                                                                                                                         | Related Subject Areas                  |
|---------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------|
| Average Deal Size - Trend Analysis    | Shows the 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 the revenue line win rate and conversion rate percentages and sales stage.                                                                                             | CX - Opportunity Revenue Line          |
| Win Rate and Conversion Rate Trend    | Shows the historical trend of revenue line win rate and conversion rate by sales stage.                                                                                      | CX - Opportunity Revenue Line Snapshot |
| Top 20 Accounts                       | Shows the top 20 accounts based on open and won revenue. It also provides a breakdown of won revenue by account and product, as well as account and territory.               | CX - Opportunity Revenue Line          |
| Team All - Stars                      | Lists sales resources or credit recovers with the highest number of wins and deal sizes.                                                                                     | CX - Opportunity Revenue Line          |
| Converted Opportunity Pipeline        | Shows a summary of the converted opportunities (converted from leads) such as converted opportunity line revenue, average won line revenue, and converted revenue over time. | CX - Opportunity Revenue Line          |
| Opportunity Days to Close             | Shows how long it takes to close opportunities, and compares them with the converted opportunities closure time and rates.                                                   | CX - Opportunity                       |
| Converted Opportunity Revenue         | Shows the pipeline contributed by converted opportunities.                                                                                                                   | CX - Opportunity                       |
| Opportunity Stage Progression         | Shows the details on the stages that Opportunities have progressed through.                                                                                                  | CX-Opportunity Stage Progression       |
| Renewal Sales Dashboard               | Shows the summary of opportunities created as part of the renewal selling.                                                                                                   | CX - Opportunity Revenue Line          |

## Quote and Order Capture

| Analyses Detail      | Analyses Description                                                                                                               | Related Subject Areas  |
|----------------------|------------------------------------------------------------------------------------------------------------------------------------|------------------------|
| Opportunity Quotes   | Shows the summary of the opportunity quotes raised, statuses by their owners, quotes raised over time period, etc.                 | CX - Opportunity Quote |
| Quote Cycle Time     | Provides insight into 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 a 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 |

| Analyses Detail             | Analyses Description                                                                          | Related Subject Areas       |
|-----------------------------|-----------------------------------------------------------------------------------------------|-----------------------------|
| 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 percentage, and the cycle time. | CX - Opportunity Quote      |

## Service Request Management

### Prebuilt Analyses

| Analyses Detail           | Analyses Description                                                                                                     | Related Subject Areas |
|---------------------------|--------------------------------------------------------------------------------------------------------------------------|-----------------------|
| SR Overview               | Shows a summary of 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 details of critical SRs by sales account and related details.                                                   | CX - Service Request  |
| Agent Performance Details | Provides insights into how the service agents performance is, such as the resolved SRs, average time to resolve, etc.    | CX - Service Request  |
| SR Resolution             | Shows a summary of resolved SRs, the time it took to resolve them by month and by severity, etc.                         | CX - Service Request  |
| SRs by Channel            | Shows a summary of SRs by different channels that were used for the SRs.                                                 | CX - Service Request  |
| SRs by Service Category   | Shows a 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 existing Subscription metrics (Active MRR, Active Customers, ARPU, Active TCV etc.) and shows Renewals, Upgrades, Downgrades over a period of time. | CX - Subscriptions                                                               |
| Subscription Trends      | Shows the trend of Active MRR, Active Customer, Active TCV, ARPU, Churn Rate, Renewal Rate, etc. over a period of time.                                                      | CX - Subscription Historical Trend                                               |
| Subscription AR Overview | Summarizes the Subscription AR transactions, and shows the overdue invoices and the credit memos raised for Subscription invoices.                                           | Financials - AR Revenue* * This report is enabled for customers using CX+ERP sku |

## 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 analysis uses the last touch attribution model.        | CX - Campaign Opportunity Revenue |
| Campaign Attributed Pipeline      | Shows the pipeline contribution from the opportunities attributable to the campaign.                                                                                | CX - Campaign Opportunity Revenue |
| Campaign ROI                      | Shows the ROI from each campaign and the attributable won revenue.                                                                                                  | CX - Campaign Opportunity Revenue |
| Cost Per Opportunity Revenue Line | Provides insight on the average campaign cost incurred on generating a single opportunity revenue line. It also provides a comparison based on different campaigns. | CX - Campaign Opportunity Revenue |
| Cost Per Won Revenue              | Shows the average campaign cost for every earning. It also provides a comparison of this metric with different campaigns and products.                              | CX - Campaign Opportunity Revenue |
| Top Campaigns                     | Shows the best performing campaigns based on different parameters such as ROI, number of wins, revenue generated, etc.                                              | CX - Campaign Opportunity Revenue |
| 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 |

## Prebuilt Business Metrics

### Overview

These 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.

Predefined business metrics allow a user to view business performance and drill into the details to understand why a value may be off the target. Only Analytic Currency metrics are used in the predefined content.



#### Note:

Key metrics have replaced key performance indicators (KPIs) in release 24R1.

## Activity Management

| Business Metric Name                                                | Business Metric Description                                                                     | Related Subject Areas     |
|---------------------------------------------------------------------|-------------------------------------------------------------------------------------------------|---------------------------|
| Number of Activities                                                | Shows the number of activities.                                                                 | CX - Activity             |
| New Activities                                                      | Shows activities created in the last seven days.                                                | CX - Activity             |
| Activity Rate - Won Opportunities                                   | Shows the average number of activities for won opportunities.                                   | CX - Opportunity Activity |
| Task Rate - Won Opportunities                                       | Shows the average number of tasks created for won opportunities.                                | CX - Opportunity Activity |
| Appointment Rate - Won Opportunities                                | Shows the average number of appointments created for won opportunities.                         | CX - Opportunity Activity |
| Meeting Rate for Won Opportunities                                  | Shows the average number of meetings for won opportunities                                      | CX - Opportunity Activity |
| Demo Rate Won Opportunities                                         | Shows the average number of demos for won opportunities.                                        | CX - Opportunity Activity |
| Average Number of Activities Per Team Member For Won Opportunities  | Shows the average number of activities per team member for won opportunities.                   | CX - Opportunity Activity |
| Average Number of Activities Per Team Member For Lost Opportunities | Shows the average number of activities per team member for lost opportunities.                  | CX - Opportunity Activity |
| Activity Rate for Open Opportunities                                | Shows the average number of activities for currently open opportunities.                        | CX - Opportunity Activity |
| Number of Customer-facing Tasks for Won Opportunities               | Shows the number of tasks by type (call, chat, demo, meeting, or email) for won opportunities.  | CX - Opportunity Activity |
| Number of Customer facing tasks for Lost Opportunities              | Shows the number of tasks by type (call, chat, demo, meeting, or email) for lost opportunities. | CX - Opportunity Activity |
| Activity Duration For Completed Activities                          | Shows the average activity duration for completed activities.                                   | CX - Activity             |
| Opportunity Activities Rate                                         | Shows the average number of complete activities per opportunity.                                | CX - Opportunity Activity |
| Lead Activities Rate                                                | Shows the average number of completed activities per lead.                                      | CX - Lead Activity        |
| Team Member Activity Rate                                           | Shows the average number of activities per team member.                                         | CX - Activity             |

## Lead Management

| Business Metric Name        | Business Metric Description                                                                          | Related Subject Areas |
|-----------------------------|------------------------------------------------------------------------------------------------------|-----------------------|
| Number of Leads             | Shows the number of leads created in the reporting period.                                           | CX - Leads            |
| Lead Qualification Rate (%) | Shows the number of leads qualified, expressed as a percentage of the total number of leads created. | CX - Leads            |
| Lead Conversion Rate (%)    | Shows the number of leads converted, expressed as a percentage of the total number of leads created. | CX - Leads            |

| Business Metric Name                            | Business Metric Description                                                                                  | Related Subject Areas |
|-------------------------------------------------|--------------------------------------------------------------------------------------------------------------|-----------------------|
| Lead Rejection Rate (%)                         | Shows the number of leads rejected, expressed as a percentage of the total number of leads created.          | CX - Leads            |
| Average Lead Age                                | Shows the average number of days the lead is open before it's converted, rejected or retired.                | CX - Leads            |
| Lead Qualification to Conversion Velocity       | Shows the average number of days before the qualified lead is converted.                                     | CX - Leads            |
| Number of Qualified Expired Leads               | Shows the number of qualified expired leads.                                                                 | CX - Leads            |
| Won Revenue By Lead Channel                     | Shows the won opportunity revenue generated from leads based on their lead channel.                          | CX - Leads            |
| Accounts - Leads                                | Shows the accounts with the highest number of open leads.                                                    | CX - Leads            |
| Opportunity Pipeline Split - Sales vs Marketing | Shows the number of open opportunities by sales stage for opportunities generated from sales vs marketing.   | CX - Leads            |
| New Leads                                       | Shows new leads created based on the lead creation date.                                                     | CX - Leads            |
| Lead to Opportunity Velocity                    | Shows the average number of days a lead has taken from the day the lead is created to the day its converted. | CX - Leads            |

## Marketing Campaigns

| Business Metric Name                              | Business Metric Description                                                                                 | Related Subject Areas             |
|---------------------------------------------------|-------------------------------------------------------------------------------------------------------------|-----------------------------------|
| Campaign Attributed Leads                         | Shows the number of leads generated from marketing campaigns.                                               | CX - Campaign Members             |
| Campaign Attributed Opportunities                 | Shows the number of opportunities generated from marketing campaigns (using the last touch model).          | CX - Campaign Opportunity Revenue |
| Campaign Attributed Pipeline                      | Shows pipeline revenue contributions from campaign-attributable opportunities (using the last touch model). | CX - Campaign Opportunity Revenue |
| Campaign Attributed Won Revenue                   | Shows the total revenue attributed to a campaign for all opportunities with a closed-won status.            | CX - Campaign Opportunity Revenue |
| Campaign ROI                                      | Shows a campaign return on investment based on campaign actual cost and campaign attributable revenue.      | CX - Campaign Opportunity Revenue |
| Campaign Responses                                | Shows the number of responses for each campaign.                                                            | CX - Campaign Opportunity Revenue |
| Campaign Actual Vs Budgeted Cost                  | Shows the ratio of actual cost / budgeted cost for every campaign.                                          | CX - Campaign Opportunity Revenue |
| Campaign Attributed Won Opportunity Revenue Lines | Shows the number of won opportunity revenue lines from opportunities attributable to a campaign.            | CX - Campaign Opportunity Revenue |

| Business Metric Name                               | Business Metric Description                                                                       | Related Subject Areas             |
|----------------------------------------------------|---------------------------------------------------------------------------------------------------|-----------------------------------|
| Campaign Attributed Lost Opportunity Revenue Lines | Shows the number of lost opportunity revenue lines from opportunities attributable to a campaign. | CX - Campaign Opportunity Revenue |
| Campaign Attributed Open Opportunity Revenue Lines | Shows the number of open opportunity revenue lines from opportunities attributable to a campaign. | CX - Campaign Opportunity Revenue |
| Cost Per Opportunity Revenue Line                  | Shows the ratio of campaign actual cost and the number of opportunity revenue lines.              | CX - Campaign Opportunity Revenue |
| Cost Per Won Opportunity Revenue Line              | Shows the ratio of campaign actual cost and the number of won opportunity revenue lines.          | CX - Campaign Opportunity Revenue |
| Cost Per Won Revenue                               | Shows the ratio of campaign actual cost and won opportunity line revenue.                         | CX - Campaign Opportunity Revenue |
| Cost Per Attributed Revenue                        | Shows the ratio of campaign actual cost and total attributable opportunity line revenue.          | CX - Campaign Opportunity Revenue |
| Top Campaigns                                      | Shows the top campaigns with the highest won revenue.                                             | CX - Campaign Opportunity Revenue |
| Campaign Engaged Contacts                          | Shows the number of contacts targeted by campaigns.                                               | CX - Campaign Opportunity Revenue |
| Campaign Targeted Accounts                         | Shows the number of accounts targeted by campaigns.                                               | CX - Campaign Opportunity Revenue |

## Opportunity Management

| Business Metric Name    | Business Metric Description                                                                                                                                             | Related Subject Areas              |
|-------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------|
| Won Sales               | Describes the total sales revenue for the period where opportunity status category = won.                                                                               | CX - Opportunity Revenue Line      |
| Lost Sales              | Describes the total sales revenue for the period where opportunity status category = lost.                                                                              | CX - Opportunity Revenue Line      |
| Sales Pipeline          | Describes the total revenue of opportunity revenue lines with an open status category.                                                                                  | CX - Opportunity Revenue Line      |
| Weighted Pipeline       | Describes the weighted pipeline measures sales revenue based on the opportunity win probability percentages assigned to the open opportunities in the current pipeline. | CX - Opportunity Revenue Line      |
| Sales Pipeline Velocity | Shows how quickly deals move through the pipeline and generate revenue.                                                                                                 | CX - Opportunity Stage Progression |
| Sales Stage Velocity    | Shows the average time spent in a stage before opportunities move to closed - won or closed - lost.                                                                     | CX - Opportunity Stage Progression |
| Sales Funnel Leakage    | Also known as stage drop off rates, the sales funnel leakage tells you where prospects drop out of your funnel at the greatest rates.                                   | CX - Opportunity Revenue Line      |

| Business Metric Name                       | Business Metric Description                                                                                       | Related Subject Areas              |
|--------------------------------------------|-------------------------------------------------------------------------------------------------------------------|------------------------------------|
| Sales Stage Progression                    | Shows how quickly opportunities are moving through the sales stages.                                              | CX - Opportunity Stage Progression |
| Average Deal Size                          | Describes the closed opportunity line revenue averaged over the number of revenue lines.                          | CX - Opportunity Revenue Line      |
| Win Rate %                                 | Describes the rate in which opportunity revenue lines are being closed - won.                                     | CX - Opportunity Revenue Line      |
| Deals At Risk                              | Describes the top 'N' open opportunities (by revenue) with a win probability of <= 50%.                           | CX - Opportunity Revenue Line      |
| Revenue From Accounts                      | Lists the top accounts by won revenue for the reporting period.                                                   | CX - Opportunity Revenue Line      |
| Team All-Stars                             | Displays details of primary resources with the 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, or usage).                                               | CX - Opportunity Revenue Line      |
| Renewal Pipeline                           | Shows all of 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      |
| 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                            | Shows the number of won and lost opportunities from converted leads.                                              | CX - Opportunity                   |
| Opportunities from Leads (%)               | Shows the percentage of opportunities of the total number of converted leads.                                     | CX - Opportunity                   |
| Average Converted Opportunity Line Revenue | Shows the average opportunity line revenue of the opportunities converted from leads.                             | CX - Opportunity Revenue Line      |
| Line Revenue from Converted Leads          | Shows the open opportunities line revenue from converted leads.                                                   | CX - Opportunity Revenue Line      |
| Lead Generated Pipeline                    | Shows the number of open opportunities by sales stage for opportunities generated from leads vs from non-leads.   | CX - Opportunity                   |
| Days to Close Converted Leads              | Shows the average of (opportunity close date - opportunity creation date) for opportunities converted from leads. | CX - Opportunity                   |

## Subscription Management

| Business Metric Name            | Business Metric Description                                                                                                                              | Related Subject Areas              |
|---------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------|
| Monthly Recurring Revenue (MRR) | Shows the total MRR for subscription lines                                                                                                               | CX - Subscription Historical Trend |
| Product Net price (TCV)         | Shows the total Subscription Net Amount                                                                                                                  | CX - Subscription Historical Trend |
| Active Customers                | Shows the total number of customers with an active subscription at the start or end of a given period                                                    | CX - Subscription Historical Trend |
| Average Revenue per User (ARPU) | Shows the total MRR divided by the total number of active customers at the start or end of a given period                                                | CX - Subscription Historical Trend |
| Churned Customers               | Shows the total number of customers churned in a given period                                                                                            | CX - Subscription Historical Trend |
| MRR Churn Rate                  | Shows the rate at which MRR is lost from churned subscriptions.                                                                                          | CX - Subscription Historical Trend |
| Customer Churn Rate             | Shows the proportion of active customers that became inactive during the given period. A customer is active if they have a currently active subscription | CX - Subscription Historical Trend |
| MRR Renewal Rate                | Shows the rate of MRR renewal calculated as activated renewal MRR divided by the MRR due for renewal in a given period.                                  | CX - Subscription Historical Trend |

## Quote and Order Capture

| Business Metric Name                 | Business Metric Description                                         | Related Subject Areas       |
|--------------------------------------|---------------------------------------------------------------------|-----------------------------|
| Active Quotes                        | Shows the number of active quotes created.                          | CX - Opportunity Quote      |
| Average Quotes for Won Opportunities | Shows the average number of quotes for won opportunities.           | CX - Opportunity Quote      |
| Quote Cycle Time                     | Shows the total elapsed time from quote-to-order.                   | CX - Opportunity Quote      |
| Quote Conversion Rate                | Shows the number of closed quotes as a percentage of active quotes. | CX - Opportunity Quote      |
| Average Contract Value               | Shows the average contract value.                                   | CX - Opportunity Quote      |
| Opportunity to Quote Velocity        | Shows the opportunity to quote cycle time.                          | CX - Opportunity Quote      |
| Average Recurring Revenue            | Shows the average recurring revenue.                                | CX - Opportunity Quote      |
| Active Quote Win Rate                | Shows the number of won quotes as a percentage of closed quotes.    | CX - Opportunity Quote      |
| Number of Quotes Lines               | Shows the number of quote lines created.                            | CX - Opportunity Quote Line |
| Number of Active Quotes with Lines   | Shows the number of active quotes with quote lines.                 | CX - Opportunity Quote Line |
| Contract Line Value                  | Shows the total contract line value for active quotes.              | CX - Opportunity Quote Line |
| Average Contract Line Value          | Shows the average contract quote line value.                        | CX - Opportunity Quote Line |
| Quote Line Conversion Rate           | Shows the number of quote lines converted.                          | CX - Opportunity Quote Line |

| Business Metric Name           | Business Metric Description                              | Related Subject Areas       |
|--------------------------------|----------------------------------------------------------|-----------------------------|
| Average Quote Line Cycle Time  | Shows the average elapsed time from quote line to order. | CX - Opportunity Quote Line |
| Number of Quoted Opportunities | Shows the number of quoted opportunities.                | CX - Opportunity            |

## Service Request Management

| Business Metric Name               | Business Metric Description                                                 | Related Subject Areas |
|------------------------------------|-----------------------------------------------------------------------------|-----------------------|
| Service Requests by Status         | Shows the number of CX service requests by their status.                    | CX - Service Request  |
| SR Backlog Rate (%)                | Shows the percentage of open SRs relative to the total SRs by age category. | CX - Service Request  |
| Escalation (Critical SR's)         | Shows the number of SRs that are marked critical.                           | CX - Service Request  |
| SR Resolution (%)                  | Shows the number of SRs in resolved status.                                 | CX - Service Request  |
| Agent Performance                  | Shows the average time (days) to resolve issues by service agents.          | CX - Service Request  |
| SRs by Service Category            | Shows the number of open SRs by service category.                           | CX - Service Request  |
| SRs by Channel                     | Shows the number of open SRs by channel.                                    | CX - Service Request  |
| Top 10 Customers (With Active SRs) | Shows the top 10 customers with the most active open SRs.                   | CX - Service Request  |

## Prebuilt Dashboards

### Overview

A dashboard is an object that provides a series of overview or detailed business metrics

#### Overview Dashboards

An overview dashboard is a top-level object containing multiple business metrics.

Each dashboard typically contains as many as 8 composite visualizations. These present an aggregated value for the business metric, a supplemental visualization and with a drill down capability to Data Visualization content found in detail dashboards.

To access prebuilt data visualizations, go to **Shared Folders**, click **Oracle**, click **Fusion CX**, and then click **Overview Dashboards**. All prebuilt decks are migrated to workbooks in Oracle Analytics Cloud, and you can find these in the **Detail Dashboards** folder, located within the parent application folder.

#### Detail Dashboards

Detail dashboards typically contain more in-depth analyses along with filters focused on a specific topic. These workbooks can be launched directly or starting from an overview dashboard.

To access prebuilt data visualizations, go to **Shared Folders**, click **Oracle**, click **Fusion CX**, and then click **Detail Dashboards**.

**Note:**

Workbooks have replaced decks and visualizations have replaced cards in release 24R1.

## Prebuilt Dashboards

| Workbook Name          | Workbook Description                                                                                                                                                                                                                                                   |
|------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Sales Pipeline         | Includes Business Metrics for measuring the overall health of the sales pipeline.                                                                                                                                                                                      |
| Win-Loss Analysis      | Includes Business Metrics that provide insights and metrics on opportunity outcomes (won and lost) and the related opportunity revenue figures.                                                                                                                        |
| Sales Activity         | Includes Business Metrics that provides insights on sales activities performed in the current quarter and how they relate to opportunity outcomes (won and lost).                                                                                                      |
| Leads                  | Provides Business Metrics for tracking important lead metrics including those related to lead conversions and lead qualifications.                                                                                                                                     |
| Campaign Effectiveness | Includes Business Metrics that help marketing and sales users measure campaign ROI metrics, and important conversion metrics as part of the campaign to opportunity process flow.                                                                                      |
| Opportunity Quotes     | Includes Business Metrics that help sales users gain insight into the quotes created in the system, and the contract value and cycle times associated with those quotes.                                                                                               |
| SR Management          | Includes Business Metrics to help service managers and reps to get an overview of the SRs raised in the system, and what's the rate, escalations, and how they're being handled by the agents.                                                                         |
| Lead Conversion        | Includes Business Metrics that provide insight into 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          | Includes Business Metrics that provide insights and metrics on the renewal opportunity pipeline, the related revenue figures, and their won rate.                                                                                                                      |
| Subscriptions          | Includes Business Metrics that provide insight and metrics on Subscription MRR and TCV, along with additional details about Customers and their Churn.                                                                                                                 |

# A

## Report Authoring Tips

This section provides tips and guidelines for creating effective and timely reports.

### Topics

- [Common Report Authoring Tips](#)
- [Report Authoring Tips for Oracle Fusion CX Analytics](#)

## Common Report Authoring Tips

Improve all of your Oracle Fusion Data Intelligence reports with these recommendations and answers to frequently asked questions regarding reporting. The information isn't exhaustive and is updated regularly with additional information and authoring tips.

### Tips for Filters

When applying filters to reports, follow these guidelines:

- Use dashboard filters instead of workbook or canvas filters for user interactions in analyses.
- Use workbook filters for hidden and non-interaction filters.
- Set the Limit by Values to **None** for all filters in custom workbooks or dashboards to improve performance of prompts.
- When applying a filter on an attribute, use a Code column (when available) instead of a Name or Description column.
- Always apply the necessary filters first before you start building visualizations to ensure optimal queries are created when you add the metrics required in the visualization.

### Tips for Brushing

Disable brushing to improve report performance. See [Update Canvas Properties](#).

### Tips for Working with Currency

To display the currency format for currency amounts, set the number format in each visualization as a custom currency. Then in the subject area folder, select the currency column. See [Set Currency Symbols for Visualizations](#).

### Tips for Reporting on Attributes Across Multiple Dimensions

When reporting on attributes against multiple dimensions, always use a measure in the report. In subject areas with more than one fact, the measure sets the correct context in the query, builds an accurate navigational path, and returns the expected results. If you don't want the measure to show in the report, hide it. See [Hide or Delete a Column](#).

### Tips for Presentation Hierarchies

To improve performance, use presentation columns instead of presentation hierarchies. See [Work with Presentation Tables and Columns](#).

# Report Authoring Tips for Oracle Fusion CX Analytics

Improve your Oracle Fusion CX Analytics reports with these recommendations and answers to frequently asked questions regarding reporting. The information isn't exhaustive and is updated regularly with additional information and authoring tips.

## Tips on Reporting on Historical Snapshot Subject Areas

Oracle Fusion CX Analytics provides two subject areas on historical snapshot data, namely CX - Opportunity Snapshot and CX - Opportunity Revenue Line Snapshot. When reporting by snapshot data, always include snapshot date as part of the grain of the report. Follow these guidelines:

- When filtering by snapshot date, clearly filter or anchor reports to one or multiple snapshots of your choice.
- Show data by snapshot date to prevent the amounts from different snapshots being aggregated together which results in double-counting.
- Apply additional filters such as expected close date to improve functionality.

### Example

For the pipeline of a quarter, such as 2021Q3, create a report that shows the historical open revenue amount by snapshots periods, such as 07-21 and 08-21.

- The report has a dashboard filter Revenue Line Snapshot Enterprise Period that anchors to two snapshots of 07-21 and 80-21 of the user's choice.
- The report shows the Revenue Line Snapshot Enterprise Period in the table so that amounts from each snapshot appear separately.
- The dashboard filter Opportunity Expected Close Enterprise Quarter generates the intended opportunity data.

## Tips on Reporting Pipeline Historical Changes

Oracle Fusion CX Analytics provides the ability to report pipeline historical changes. In the subject area CX - Opportunity Snapshot, change metrics are grouped under the presentation table Facts - Opportunity Changes. In the subject area CX - Opportunity Revenue Line Snapshot, change metrics are grouped under three presentation tables for the three currencies supported, namely Facts - Revenue Line Changes - Document Currency, Facts - Revenue Line Changes - CX Currency, and Facts - Revenue Line Changes - Analytics Currency. In general, change metrics can be classified into two types.

- Changes in lifecycle. Examples are:
  - Number of Changes to Expected Enterprise Line Close Period. It aggregates the total number of times the Revenue Line Expected Close Period has been changed in its lifecycle until the end of the selected snapshot period.
  - Number of times Revenue Line Amount Increased. It aggregates the total number of times the Revenue Line Expected Amount has been increased until the end of the selected snapshot period.
- Changes within the snapshot reporting period. Examples are:
  - o # of Revenue Lines Moved Out by 1 Period in The Selected Snapshot Period. It counts the number of Revenue Lines moved out by 1 period from the selected snapshot period.
  - o # of New Revenue Lines Added in The Selected Snapshot Period. It counts New Revenue Lines added to selected snapshot period.

To build reports on historical changes with good query performance, need to follow the following guidelines.

- Filter the set of opportunities or opportunity revenue lines to report. For example, filter by the current Opportunity Revenue Line Expected Close Enterprise Quarter = "Q2 2024". Without a proper filter on the set of opportunities of interest, filtering by snapshot period only isn't enough, which results in scanning all the opportunities in the snapshots and slows down query performance.
- "Changes in lifecycle" will sum up the changes across snapshots in life cycle till the end of snapshot period. To reduce and snapshots involved in a query for better performance, limit the query to one snapshot quarter or less. For example, filter by Opportunity Revenue Line Snapshot Enterprise Quarter = "Q1 2024".
- For the two types of change metrics mentioned above, try not to mix them in one query. The two types of change metrics follow different ways to aggregate data. Create two visualizations for the two types in one workbook, so that two separate queries are issued without overlapping.

### Recommended Filters

Items with an asterisk (\*) are required.

| Subject Area                           | Presentation Table (Recommended Filter)                                                                                                                                                                                                                                                                                  |
|----------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| CX - Activity                          | Filter by at least one of the dates below. <ul style="list-style-type: none"> <li>• Activity Actual Start Date</li> <li>• *Activity Created Date</li> <li>• Activity Actual End Date</li> </ul>                                                                                                                          |
| CX - Campaign Activity Analysis        | To build a meaningful report on Campaign, need to filter by one or more campaigns. <ul style="list-style-type: none"> <li>• *Campaign</li> <li>• Campaign End Date</li> <li>• Campaign Start Date</li> <li>• Campaign Created Date</li> </ul>                                                                            |
| CX - Campaign Activity Detail Analysis | To build a meaningful report on Campaign, need to filter by one or more campaigns. <ul style="list-style-type: none"> <li>• Campaign</li> <li>• *Campaign Activity Date</li> <li>• Campaign End Date</li> <li>• Campaign Start Date</li> <li>• Campaign Created Date</li> </ul>                                          |
| CX - Campaign Members                  | To build a meaningful report on Campaign, need to filter by one or more campaigns. <ul style="list-style-type: none"> <li>• *Campaign</li> </ul>                                                                                                                                                                         |
| CX - Campaign Opportunity Revenue      | To build a meaningful report on Campaign, need to filter by one or more campaigns. <ul style="list-style-type: none"> <li>• *Campaign</li> </ul>                                                                                                                                                                         |
| CX - Lead Activity                     | Filter by at least one of the dates below. <ul style="list-style-type: none"> <li>• Activity Actual Start Date</li> <li>• *Activity Created Date</li> <li>• Activity Actual End Date</li> <li>• *Lead Created Date</li> <li>• Lead Qualified Date</li> <li>• Lead Converted Date</li> <li>• Lead Retired Date</li> </ul> |

| Subject Area                           | Presentation Table (Recommended Filter)                                                                                                                                                                                                                                                                                                                                                                                  |
|----------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| CX - Leads                             | Filter by at least one of the dates below <ul style="list-style-type: none"> <li>• *Lead Created Date</li> <li>• Lead Qualified Date</li> <li>• Lead Converted Date</li> <li>• Lead Qualified Date</li> </ul>                                                                                                                                                                                                            |
| CX - Opportunity                       | Filter by at least one of the dates below <ul style="list-style-type: none"> <li>• *Opportunity Expected Close Date</li> <li>• Opportunity Actual Close Date</li> <li>• Opportunity Created Date</li> <li>• *Sales Stage</li> </ul>                                                                                                                                                                                      |
| CX - Opportunity Activity              | Filter by at least one of the dates below. <ul style="list-style-type: none"> <li>• Activity Actual Start Date</li> <li>• *Activity Created Date</li> <li>• Activity Actual End Date</li> <li>• *Opportunity Expected Close Date</li> <li>• Opportunity Actual Close Date</li> <li>• Opportunity Created Date</li> <li>• *Sales Stage</li> </ul>                                                                         |
| CX - Opportunity Quote                 | Filter by at least one of the dates below <ul style="list-style-type: none"> <li>• *Opportunity Expected Close Date</li> <li>• Opportunity Actual Close Date</li> <li>• *Quote Creation Date</li> <li>• Quote Contract Start Date</li> <li>• Quote Contract End Date</li> <li>• Quote Expiration Date</li> <li>• Order Placed On Date'</li> </ul>                                                                        |
| CX - Opportunity Quote Line            | Filter by at least one of the dates below <ul style="list-style-type: none"> <li>• *Quote Line Creation Date</li> <li>• Quote Line Contract Start Date</li> <li>• Quote Line Contract End Date</li> <li>• Quote Creation Date</li> <li>• Quote Line Order Date</li> <li>• Quote Line Request Date</li> </ul>                                                                                                             |
| CX - Opportunity Revenue Line          | Filter by at least one of the dates below along with Sales Stage <ul style="list-style-type: none"> <li>• Opportunity Revenue Line Created Date</li> <li>• Opportunity Revenue Line Expected Close Date</li> <li>• Opportunity Revenue Line Actual Close Date</li> <li>• Opportunity Created Date</li> <li>• Opportunity Expected Close Date</li> <li>• Opportunity Actual Close Date</li> <li>• *Sales Stage</li> </ul> |
| CX - Opportunity Revenue Line Snapshot | Reference how to build report using historical snapshot above. <ul style="list-style-type: none"> <li>• *Opportunity Revenue Line Snapshot Date</li> <li>• *Opportunity Revenue Line Expected Close Date</li> <li>• Opportunity Revenue Line Actual Close Date</li> <li>• *Historical Sales Stage</li> </ul>                                                                                                             |

| Subject Area                       | Presentation Table (Recommended Filter)                                                                                                                                                                                                                                                                                                                                                                                                                          |
|------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| CX - Opportunity Snapshot          | <p>Reference how to build report using historical snapshot above.</p> <ul style="list-style-type: none"> <li>• *Opportunity Snapshot Date</li> <li>• *Opportunity Expected Close Date</li> <li>• Opportunity Actual Close Date</li> <li>• Opportunity Created Date</li> <li>• *Historical Sales Stage</li> </ul>                                                                                                                                                 |
| CX - Opportunity Stage Progression | <p>Filter by at least one of the dates below.</p> <ul style="list-style-type: none"> <li>• *Opportunity Expected Close Date</li> <li>• Stage Enter Date</li> <li>• Stage Exit Date</li> <li>• *Historical Sales Stage</li> </ul>                                                                                                                                                                                                                                 |
| CX - Service Request               | <p>Filter by at least one of the dates below.</p> <ul style="list-style-type: none"> <li>• *Service Request Open Date</li> <li>• Service Request Resolution Date</li> <li>• Service Request Close Date</li> <li>• Service Request Last Reopen Date</li> <li>• Service Request Last Transfer Date</li> </ul>                                                                                                                                                      |
| CX - Service Request Lifecycle     | <p>Filter by at least one of the dates below.</p> <ul style="list-style-type: none"> <li>• *Service Request Open Date</li> <li>• Service Request Resolution Date</li> <li>• Service Request Close Date</li> <li>• Service Request Change Start Date</li> <li>• Service Request Change End Date</li> </ul>                                                                                                                                                        |
| CX - Service Request Milestone     | <p>Filter by at least one of the dates below.</p> <ul style="list-style-type: none"> <li>• *Service Request Open Date</li> <li>• Service Request Resolution Date</li> <li>• Service Request Close Date</li> <li>• Service Request Milestone Due Date</li> <li>• Service Request Milestone Completion Date</li> <li>• Service Request Milestone Warning Date</li> <li>• Service Request Last Transfer Date</li> <li>• Service Request Last Reopen Date</li> </ul> |
| CX - Subscriptions                 | <p>Filter by at least one of the dimensions below.</p> <ul style="list-style-type: none"> <li>• *Sold-to Customer</li> <li>• *Subscription Product Type</li> <li>• *Inventory Item</li> <li>• Business Unit</li> <li>• Subscription Start Date</li> </ul>                                                                                                                                                                                                        |
| CX – Subscription Bill Line        | <p>Filter by at least one of the dimensions below.</p> <ul style="list-style-type: none"> <li>• *Sold-to Customer</li> <li>• *Subscription Product Type</li> <li>• *Inventory Item</li> <li>• Business Unit</li> <li>• Subscription Bill Line Invoice Date</li> <li>• Subscription Bill Line Interface Date</li> </ul>                                                                                                                                           |

| Subject Area                       | Presentation Table (Recommended Filter)                                                                                                                                                                                                                 |
|------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| CX – Subscription Historical Trend | <p>Filter by at least one of the dimensions below.</p> <ul style="list-style-type: none"><li>• *Sold-to Customer</li><li>• *Subscription Product Type</li><li>• *Inventory Item</li><li>• Business Unit</li><li>• Subscription Aggregate Date</li></ul> |

# B

## Frequently Asked Questions

The Oracle Fusion CX Analytics Frequently Asked Questions (FAQs) provide answers to the most commonly asked questions about provide solutions to improve your analytics experience.

### Topics:

- [How do I synchronize data security from Oracle Fusion Cloud Applications \(Cloud CX\) with Fusion Data Intelligence?](#)
- [Why do I not see data for a few metrics such as Facts - Conversion or Facts - Renewal?](#)
- [Which functional area do I need to enable to see data in all the visualizations?](#)
- [Why do I not see the data for Resource Hierarchy, that is all the owner-related dimensions \(Opportunity Owner, Activity Owner, Lead Owner, etc.\)?](#)
- [Why do the count of Eloqua activities show minor differences from what I see in Eloqua Insight?](#)
- [Why do I not see some Salesforce campaigns in the Campaign Influence Report?](#)
- [Why am I not able to extract all the historical data from Eloqua?](#)

### How do I synchronize data security from Oracle Fusion Cloud Applications (Cloud CX) with Fusion Data Intelligence?

To synchronize data security, you must create a pipeline for the "Security Configuration Option" functional area in the "Customer Experience Security Configurations" offering. This pipeline enables Fusion Data Intelligence to extract the access group-based security details from Oracle Fusion Cloud Applications (Cloud CX) and load it into Fusion Data Intelligence. Based on the access group-based security setup in Oracle Fusion Cloud Applications (Cloud CX), the synchronization process brings the access group-based rules and assigns to the appropriate users based on the data role assignment to the users in Fusion Data Intelligence.

This pipeline brings data from these Oracle Fusion Cloud Applications (Cloud CX) objects and populates these tables in Fusion Data Intelligence:

| Oracle Fusion Cloud Applications Object | Corresponding Fusion Data Intelligence Table |
|-----------------------------------------|----------------------------------------------|
| Account Access                          | DW_CXS_SALES_ACCOUNT_ACCESS_D                |
| Opportunity Access                      | DW_CXS_OPPORTUNITY_ACCESS_D                  |
| Lead Access                             | DW_CXS_LEAD_ACCESS_D                         |
| Access Group Members                    | DW_CXS_ACCESS_GROUP_MEMBERS_D                |
| Object Share                            | DW_CXS_OBJECT_SHARE_D                        |
| Access Group                            | DW_CXS_ACCESS_GROUP_RF_DN_DH                 |

To ensure that synchronization happens frequently, you must schedule the incremental refreshes. See [Set Up the Pipeline Parameters](#).

1. Sign in to your service.
2. In Fusion Data Intelligence, click the Navigator.
3. In the **Navigator** menu, click **Console**.

4. On the Console, click **Data Configuration** under **Application Administration**.
5. On the Data Configuration page, click **Customer Experience**.
6. On the service page, click **Create**, select **Customer Experience Security Configurations** in **Offering**, select **Security Configuration Option** in **Functional Area**, and then click **Next**.

← Customer Experience

Cancel 1 2 3 4 Next >

Select your application areas to transfer data to the warehouse.

Offering Customer Experience Security Configurations

Functional Area Security Configuration Option

7. Review the parameters and click one of the options:
  - **Cancel:** To cancel the data pipeline for the functional area.
  - **Save:** To save the data pipeline for the functional area but not activate it.
  - **Activate:** To schedule when to run the data pipeline for the functional area. See [Activate a Data Pipeline for a Functional Area](#).
8. To ensure access group based security works properly, perform these steps:
  - Create a pipeline for the Security Configuration Option functional area and perform a data load.
  - Ensure users mapped to groups in Oracle Fusion Cloud Applications (Cloud CX) are mapped to the associated roles in Fusion Data Intelligence. See [Manage Users, Groups, Application Roles, and Data Access](#).
  - Ensure custom security roles created in Oracle Fusion Cloud Applications (Cloud CX) appear in the Fusion Data Intelligence IDCS instance, and that users are appropriately mapped to security roles, data roles, and duty roles. See [Data Roles](#) and [Data Roles](#).

### Why do I not see data for a few metrics such as Facts - Conversion or Facts - Renewal?

Oracle Fusion CX Analytics has comprehensive metrics pre-calculated for various scenarios. For example, if your organization has a process to convert a Lead into an Opportunity, you'll see the metrics under the Facts - Conversion folder in the CX -Opportunity subject area. Similarly, various other metrics which are grouped under one or more folders are dependent on the data being available, which depends on whether that feature is enabled or used in the Oracle Fusion Cloud Applications CX source system.

For example:

- Facts Renewal shows data when there's an Opportunity Renewal process configured and used.
- Facts Conversion shows data when Leads are converted into Opportunities.
- Facts Competitive shows data if there are one or more competitors associated with the Opportunities.

### Which functional area do I need to enable to see data in all the visualizations?

Oracle Fusion CX Analytics has multiple functional areas, and these are based on the various applications that your organization uses (such as Oracle Fusion Cloud Sales Automation, Oracle Configure, Price, Quote, etc.). It's a good practice to enable only those functional areas that are applicable to your organization. The [Offerings and Functional Areas](#) section provides the mapping details of functional areas, the source they belong to, and which subject areas are enabled as a result of those functional areas. Depending on which functional areas are enabled, the related subject areas and dashboards or visualizations are available.



#### Note:

Users with FAW Service Administrator privileges can see all the visualizations regardless of whether they're available to your organization because this user has privileges to see all the content even if all content isn't available to specific users.

### Why do I not see the data for Resource Hierarchy, that is all the owner-related dimensions (Opportunity Owner, Activity Owner, Lead Owner, etc.)?

The hierarchy data is generated in the Oracle Fusion Sales application and is then loaded in Oracle Fusion CX Analytics. You need to first check whether the data exists in Oracle Fusion Sales application; the required job might not have run in Oracle Fusion Sales application. Follow the steps in [Run Processes to Complete Resource and Resource Hierarchy Creation](#).

### Why do the count of Eloqua activities show minor differences from what I see in Eloqua Insight?

The Campaign and the activities (mail Opens, Email Sent, Form Submitted etc.) are stored in the Eastern Time Zone (EST) in Eloqua. Therefore, the report that you see in Eloqua Insight is shown in the EST time. When the data is extracted in the Oracle Fusion Data Intelligence warehouse, it's converted to Coordinated Universal Time (UTC) because all the other data in Oracle Fusion Data Intelligence is in UTC. Therefore, combining Eloqua data in UTC with Sales/CPQ data in UTC gives the correct results. The different in the Activity count is on account of the conversion of the timezone from EST to UTC.

### Why do I not see some Salesforce campaigns in the Campaign Influence Report?

When a campaign that's part of the Campaign influence records is deleted, the Campaign Influence records still persist in the Salesforce application. Therefore the records also show in the SF Campaign Influence subject areas in Oracle Fusion CX Analytics.

For example:

- The Campaign Influence fact shows metrics such as number of Campaigns with Influence as, for example, 3.
- If one of these Campaigns is deleted in source, as soon as the Campaign Name from the SF Campaign dimension loads, the report shows only 2 rows because the one row pertaining to the deleted Salesforce campaign is dropped.

There's no workaround for this issue because it's expected behavior.

### Why am I not able to extract all the historical data from Eloqua?

Oracle Fusion CX Analytics uses Eloqua reporting APIs to extract the data from Eloqua. Eloqua reporting APIs allow historical data extraction of upto 25 months only. Hence, Oracle Fusion CX Analytics Eloqua subject areas will show last 25 months of data only. .

See [Getting started with the reporting API](#) in the Eloqua Developer Help Center for more information.