Oracle® Sales Intelligence

User Guide

Release 11*i*

Part No. B10990-01

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Oracle Sales Intelligence User Guide, Release 11*i*

Part No. B10990-01

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Oracle Sales Intelligence User Guide, Release 11*i*

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Preface

Intended Audience

Welcome to Release 11*i* of the Oracle Sales Intelligence User Guide.

This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area.
- Oracle Sales Intelligence
- The Oracle Applications graphical user interface.

  To learn more about the Oracle Applications graphical user interface, read the *Oracle Applications User's Guide*.

See Other Information Sources for more information about Oracle Applications product information.

How To Use This Guide

This document contains the information you need to understand and use Oracle Sales Intelligence.

- Chapter 1 provides a description of Sales Intelligence, discusses key features, integrations, new features, and other aspects of the application.
- Chapter 2 describes the Opportunity Management reports.
- Chapter 3 describes the Product Management reports.

Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible, with good usability, to the disabled community. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Standards will continue to evolve over time, and Oracle is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For additional information, visit the Oracle Accessibility Program Web site at http://www.oracle.com/accessibility/.

Accessibility of Code Examples in Documentation JAWS, a Windows screen reader, may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, JAWS may not always read a line of text that consists solely of a bracket or brace.

Accessibility of Links to External Web Sites in Documentation This documentation may contain links to Web sites of other companies or organizations that Oracle does not own or control. Oracle neither evaluates nor makes any representations regarding the accessibility of these Web sites.

Other Information Sources

You can choose from many sources of information, including online documentation, training, and support services, to increase your knowledge and understanding of Oracle Sales Intelligence.

If this guide refers you to other Oracle Applications documentation, use only the Release 11*i* versions of those guides.

Online Documentation

All Oracle Applications documentation is available online (HTML or PDF). Online help patches are available on MetaLink.

Related Documentation

Oracle Sales Intelligence shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other product documentation when you set up and use Oracle Sales Intelligence.

You can read the documents online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them at http://oraclestore.oracle.com.

Documents Related to All Products

Oracle Applications User's Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI) available with this release of Oracle Sales Intelligence (and any other Oracle Applications products). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

You can access this user's guide online by choosing "Getting Started with Oracle Applications" from any Oracle Applications help file.

Documents Related to This Product

Oracle Field Sales User's Guide

This guide explains Oracle Field Sales, an HTML-based applications that provides sales managers, sales representatives, and sales executives with assistance in managing their business opportunities, customer, forecasting, incentive compensation, partners, and quotes.

Oracle Quoting User Guide

This guide explains how to use Oracle Quoting to create and manage customer quotes across all sales and interaction channels. Oracle Quoting is used to propose product solutions and perform negotiations, while enforcing consistent business rules throughout the sales cycle. Users can publish and print quotes, and eventually convert quotes to orders.

Installation and System Administration

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*. It provides a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind Applications-wide features such as Business Intelligence (BIS), languages and character sets, and Self-Service Web Applications.

Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications, the Oracle8 technology stack, and the Oracle8*i* Server technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user's guides and implementation guides.

Upgrading Oracle Applications

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11*i*. This guide describes the upgrade process and lists database and product-specific upgrade tasks. You must be either at Release 10.7 (NCA, SmartClient, or character mode) or Release 11.0, to upgrade to Release 11*i*. You cannot upgrade to Release 11*i* directly from releases prior to 10.7.

Maintaining Oracle Applications

Use this guide to help you run the various AD utilities, such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, License Manager, and others. It contains how-to steps, screenshots, and other information that you need to run the AD utilities. This guide also provides information on maintaining the Oracle applications file system and database.

Oracle Applications System Administrator's Guide

This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage concurrent processing.

Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of your Oracle Applications data.

Oracle Applications Developer's Guide

This guide contains the coding standards followed by the Oracle Applications development staff. It describes the Oracle Application Object Library components needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. It also provides information to help you build your custom Oracle Forms Developer 6*i* forms so that they integrate with Oracle Applications.

Oracle Applications User Interface Standards for Forms-Based Products

This guide contains the user interface (UI) standards followed by the Oracle Applications development staff. It describes the UI for the Oracle Applications products and how to apply this UI to the design of an application built by using Oracle Forms.

Other Implementation Documentation

Multiple Reporting Currencies in Oracle Applications

If you use the Multiple Reporting Currencies feature to record transactions in more than one currency, use this manual before implementing Oracle Sales Intelligence. This manual details additional steps and setup considerations for implementing Oracle Sales Intelligence with this feature.

Multiple Organizations in Oracle Applications

This guide describes how to set up and use Oracle Sales Intelligence with Oracle Applications' Multiple Organization support feature, so you can define and support different organization structures when running a single installation of Oracle Sales Intelligence.

Oracle Workflow Administrator's Guide

This guide explains how to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes, as well as how to monitor the progress of runtime workflow processes.

Oracle Workflow Developer's Guide

This guide explains how to define new workflow business processes and customize existing Oracle Applications-embedded workflow processes. It also describes how to define and customize business events and event subscriptions.

Oracle Workflow User's Guide

This guide describes how Oracle Applications users can view and respond to workflow notifications and monitor the progress of their workflow processes.

Oracle Workflow API Reference

This guide describes the APIs provided for developers and administrators to access Oracle Workflow.

Oracle Applications Flexfields Guide

This guide provides flexfields planning, setup and reference information for the Oracle Sales Intelligence implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This manual also provides information on creating custom reports on flexfields data.

Oracle eTechnical Reference Manuals

Each eTechnical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your existing applications, integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on Metalink

Oracle Manufacturing APIs and Open Interfaces Manual

This manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes APIs and open interfaces found in Oracle Manufacturing.

Oracle Order Management Suite APIs and Open Interfaces Manual

This manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes APIs and open interfaces found in Oracle Order Management Suite.

Oracle Applications Message Reference Manual

This manual describes Oracle Applications messages. This manual is available in HTML format on the documentation CD-ROM for Release 11i.

Oracle CRM Application Foundation Implementation Guide

Many CRM products use components from CRM Application Foundation. Use this guide to correctly implement CRM Application Foundation.

Training and Support

Training

Oracle offers training courses to help you and your staff master Oracle Sales Intelligence and reach full productivity quickly. You have a choice of educational environments. You can attend courses offered by Oracle University at any one of our many Education Centers, you can arrange for our trainers to teach at your facility, or you can use Oracle Learning Network (OLN), Oracle University's online education utility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization's structure, terminology, and data as examples in a customized training session delivered at your own facility.

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle Sales Intelligence working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle8*i* server, and your hardware and software environment.

Oracle*MetaLink*

Oracl*eMetaLink* is your self-service support connection with web, telephone menu, and e-mail alternatives. Oracle supplies these technologies for your convenience, available 24 hours a day, 7 days a week. With Oracl*eMetaLin*k, you can obtain information and advice from technical libraries and forums, download patches, download the latest documentation, look at bug details, and create or update TARs. To use MetaLink, register at (http://metalink.oracle.com).

Alerts: You should check Oracl*eMetaLink* alerts before you begin to install or upgrade any of your Oracle Applications. Navigate to the Alerts page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade/Alerts.

Self-Service Toolkit: You may also find information by navigating to the Self-Service Toolkit page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade.

Do Not Use Database Tools to Modify Oracle Applications Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus®, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using Oracle Applications can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

About Oracle

Oracle Corporation develops and markets an integrated line of software products for database management, applications development, decision support, and office automation, as well as Oracle Applications, an integrated suite of more than 160 software modules for financial management, supply chain management, manufacturing, project systems, human resources and customer relationship management.

Oracle products are available for mainframes, minicomputers, personal computers, network computers and personal digital assistants, allowing organizations to integrate different computers, different operating systems, different networks, and even different database management systems, into a single, unified computing and information resource.

Oracle is the world's leading supplier of software for information management, and the world's second largest software company. Oracle offers its database, tools, and applications products, along with related consulting, education, and support services, in over 145 countries around the world.

1 Introduction to Oracle Sales Intelligence

This chapter discusses the key features and process flows of Oracle Sales Intelligence. Sections in this chapter include:

- Section 1.1, "Overview"
- Section 1.2, "Oracle Sales Intelligence Key Features"
- Section 1.3, "Oracle Sales Intelligence Integrations"
- Section 1.4, "Responsibilities"
- Section 1.5, "Sales Intelligence Report Structure"
- Section 1.6, "Report Personalization Features"
- Section 1.7, "Common Report Parameters"
- Section 1.8, "Sales Intelligence Reports and Field Sales Opportunity Status Codes"
- Section 1.9, "Values in Reports"
- Section 1.10, "Refreshing Data in Reports"
- Section 1.11, "New in this Release"
- Section 1.12, "Obsolete in this Release"
- Section 1.13, "Accessing Oracle Sales Intelligence"

1.1 Overview

Oracle Sales Intelligence is an analytical application that integrates with the Oracle Sales Applications family. These transactional applications provide most of the data for summarization and analysis in the Sales Intelligence reports. Sales Intelligence can be used independently or in with Sales Daily Business Intelligence (DBI).

Using the reporting and analytical capabilities of Sales Intelligence senior executives as well as sales and marketing managers can obtain comprehensive, real-time views of the sales cycle, assess current sales performance. They can then take any necessary action to meet sales quotas.

Sale professionals who are responsible for day-to-day product and opportunity management can use Sales Intelligence to target efforts and increase productivity. Sales Intelligence also shows trends in opportunities and product data, and provides drill down into the organization hierarchy to allow identification of possible problems. In addition, users can view past and current performance to determine any gaps between sales quotas and actual performance.

Sales Intelligence report access is controlled through user responsibility and Sales Group.

Note: The reports in Sales Intelligence are not standard Oracle reports. They are special reports that were developed using Oracle Performance Management Viewer (PMV). PMV is a foundation technology component for Sales Intelligence that defines and renders reports.

1.2 Oracle Sales Intelligence Key Features

Oracle Sales Intelligence includes the following features:

- Opportunity Management Reports
- Product Management Reports

Opportunity Management Reports

This group of reports provides opportunity pipeline management information to sales managers or top executives. These reports provide a summarized and comparative view of subordinate Sales Group performances in the reporting chain. Drill down is available to the individual sales representative level. Also, if individual product performance is of concern, managers can switch the 'View By' to 'Product Category' to view data summarized along the Product dimension.

These reports include:

- Opportunity Summary

- Opportunity Analysis by Amount Bands
- Opportunity Analysis by Amount Bands (Trend)
- Opportunity Win/Loss Analysis
- Opportunity Win/Loss Analysis (Trend)
- Opportunity Acquisition by Prospect or Customer (Trend)
- Opportunity Detail

Product Management Reports

This group of reports allows users to view at a glance how each selling product performs and stacks up against each other. Top/Bottom Products report shows the top or bottom selling products by certain performance measures, such as units sold, gross margin, or win/loss ratio. Product Pipeline and Sales Growth (Trend) report is a trend report, which depicts the change of product selling momentum over time.

These reports include:

- Top/Bottom Products Report
- Product Pipeline and Sales Growth (Trend)

For previously-released Sales Intelligence reports that are still available, refer to the 11.5.8 version of the *Oracle Sales Intelligence User Guide*, part number B10098-02.

1.3 Oracle Sales Intelligence Integrations

Oracle Sales Intelligence integrates with the following modules and applications:

- PMV/PMF (Reporting Framework)
- Oracle Field Sales/TeleSales
- Oracle Incentive Compensation
- Oracle Financial Intelligence (DBI)
- Oracle Order Management
- Oracle Product Development Intelligence (DBI)
- Oracle Customer Intelligence
- Oracle Bill of Material (BOM)

1.4 Responsibilities

Sales Intelligence uses responsibilities to regulate user access to content and functionality. A responsibility is a level of authority in Oracle Applications that lets you access the functions and data that are appropriate to your role in an organization.

A responsibility can provide access to:

- A specific report or set of reports.
- A menu that provides easy navigation to the commands or actions that the responsibility can perform.

To gain access to a report, the system administrators must assign the appropriate responsibility to the report user, just as they would assign a responsibility to an Oracle Applications user. See your system administrator for details.

1.5 Sales Intelligence Report Structure

The Sales Intelligence reports have several regions that control data display, or display data in graphs or tables. These are:

Parameters: Control the data that you see in the report. When you change the parameters values and click **Go**, the report runs and the data is refreshed. Reports use common parameters, and can also have parameters that are unique to the report. Common parameters are described in Common Report Parameters, and the unique parameters are described in Chapter 2, "Opportunity Management Reports" and Chapter 3, "Product Management Reports".

Graphs: Include pie charts, vertical and horizontal bar charts, and line charts. Graphs help you visualize proportions and trends in your sales opportunity data. The Opportunity Detail report does not have a graph. Mouse over the bars in the graphs to see the View By value, legend, and value of the represented record.

Table: Shows a detailed breakdown of sales opportunity data. This can include totals, percentages, and counts of sales data related to specific sales groups, time periods, or close reasons. The currency amounts shown in the tables are in either thousands or millions (unless the amount is less than a thousand or a million; in that case the exact amount is displayed). The first column in the table indicates the view by dimension for the data in the table. Click on the star in this column to pivot the data to another dimension. For example, from sales group to product.

The report columns exhibit default sorting behavior. Most reports contain sortable columns, however the trend reports do not. Table 1–1, "Sales Intelligence Report Sorting Behavior" describes report column sorting behavior for each report:

Table 1–1 Sales Intelligence Report Sorting Behavior

Report	Default Sorting Behavior
Opportunity Summary	Sorts by Sales Group, ascending alphabetically. All columns are sortable. Click on the arrow in the column heading to sort the data.
Opportunity Analysis by Amount Bands	Sorts by Sales Group or Product Category, ascending alphabetically. All columns are sortable. Click on the arrow in the column heading to sort the data.
Opportunity Analysis by Amount Bands (Trend)	Sorts by time, ascending by time. None of the columns are sortable.
Opportunity Win/Loss Analysis	Sorts by Close Reason, Competitor, Sales Stage, Sales Channel, or Sales Group (first default is Sales Group), ascending alphabetically. All columns are sortable. Click on the arrow in the column heading to sort the data.
Opportunity Win/Loss Analysis (Trend)	Sorts by time, ascending by time. None of the columns are sortable.
Opportunity by Prospect or Customer (Trend)	Sorts by time, ascending by time. None of the columns are sortable.
Opportunity Detail	Sorts by Sales Group, ascending alphabetically. All columns are sortable. Click on the arrow in the column heading to sort the data.
Top/Bottom Products	Sorts by Product, ascending alphabetically. All columns are sortable. Click on the arrow in the column heading to sort the data.
Product Pipeline and Sales Growth (Trend)	Sorts by time, ascending by time. None of the columns are sortable.

Note: By default, reports that sort by Sales Group will list your Sales Group first and then sale representatives in the list of sales groups in the table. If you sort other columns, however, and then resort by sales group, the list of sales groups and sales representatives will be in alphabetical order.

Links: Enable you to navigate to other Sales Intelligence reports.

The date shown in the report indicates the date that the data was last refreshed.

1.6 Report Personalization Features

The Sales Intelligence reports are Oracle Sales Intelligence use the Performance Management Viewer (PMV) to render the reports. Depending on your PMV user type, you can personalize your reports. See the *Oracle E-Business Intelligence Daily Business Intelligence User Guide* for details on PMV. The two user types are:

- **Basic User:** A standard report user.
- **Advanced User:** An administrative report user who controls the reports for a group of basic users. When an Advanced User customizes a report, those customizations are visible to all users for that site.

Table 1–2, "Personalizing Options and PMV User Types" lists the personalization options that you have if you are a Basic or Advanced User.

Table 1–2 Personalizing Options and PMV User Types

PMV User Type	Personalization Options
Basic User	■ Exporting report data to Microsoft Excel or PDF formats ■ Scheduling reports ■ Customizing report links ■ Saving report parameter values as defaults (these saved values override the shipped default values in the Sales Intelligence reports)
Advanced User	■ Same options, except the additional option of customizing tables

1.7 Common Report Parameters

These parameters are used in all of the Sales Intelligence Reports. The individual reports also use parameters that are particular to that report, and those parameters are documented in the chapters describing the reports.

These are the common report parameters:

- **Period Type:** The period type selected for analysis in the report. Available values are month, quarter, and year. The default value is month for the first time login. The default of this value is determined by the setting of the BIS: Period

Type profile. See Appendix A, "System Profile Options" and Chapter 4, "Setting Up Calendar Types" in the *Oracle Field Sales Implementation Guide* for details.

- **From Period:** Time period for the reporting of opportunity data to start. This value is dependent on the previously-selected Period Type. For example, if the period type is quarters, the available values will be Q1, Q2, Q3, and Q4. If you select All as the value for this parameter, the reports will display data for the period that includes the system date based on the period type selected. For example, if the system date is March 17, 2004, and month is the selected period type, then the From Period will have the value of March 2004. Future From Periods are displayed according to this criteria:
  - Month: system date + 12 months
  - Quarter: system date + 4 quarters
  - Year: system date + 1 year

  Reporting on past data is not subject to these limitations.
- **To Period:** Time period for the reporting of opportunity data to end. This value is dependent on the previously-selected Period Type. If you select All as the value for this parameter, the reports will display data for the period that includes the system date based on the period type selected. For example, if the system date is March 17, 2004, and month is the selected period type, then the To Period will have the value of March 2004. Future To Periods are displayed according to this criteria:
  - Month: system date + 12 months
  - Quarter: system date + 4 quarters
  - Year: system date + 1 year

  Reporting on past data is not subject to these limitations.
- **Sales Group:** The sales group selected for analysis. For security, content should be accessible and restricted by using the security model in Oracle Field Sales. Based on the sales group hierarchy setup in the Resource Manager, the user can drill down the hierarchy to analyze the performance of subordinates. Access to peer data is not allowed by the security model. The default value is the sales group of the user logged in where the user’s role in that group is "Manager" and "Admin." If there is more than one qualifying group, for the first login, the default sales group is the first sales group in the list.

For the Opportunity Detail report, the All parameter value will result in the display of the opportunities belonging to sales representatives that are subordinate to the manager running the report.

- **Product Category:** Product category in the Product Hierarchy selected for analysis. The default value is All.
- **Currency:** The currency used for monetary amounts displayed in the report. The default value is determined by the setting of the CRM BIS: Currency Code profile. When you load or refresh a report, Sales Intelligence converts your transactions.

1.8 Sales Intelligence Reports and Field Sales Opportunity Status Codes

Oracle Field Sales integrates with Sales Intelligence through the definition of Opportunity Status Code values. Opportunity Status Codes define the selections in the Opportunity Status menu list.

Status codes have certain values set for each code. These values are set by the administrator in the Administration > Sales > Opportunity> Status Codes window in Oracle Field Sales. These values are:

- **Enabled:** Checkbox to enable the status code, which makes the menu choice available in the Status menu.
- **Open:** Checkbox that specifies whether the opportunity is open or not. If this checkbox is not selected, that indicates that the opportunity is closed.
- **Include in Forecast:** Checkbox that specifies whether the information associated with the opportunity should be included in the forecast. If this checkbox is not selected, the opportunity is not included.
- **Used For / Opportunity:** Checkbox that specifies whether this status code (menu choice) should be used for the opportunity. If this checkbox is not selected, then the information associated with this status code is not used.
- **Win Loss Indicator:** Radio buttons (Win, Loss, Neither) that indicate whether an opportunity is won, lost, or no opportunity (Neither).

Depending on the selections made in the Status Code Values window, information associated with a specific opportunity is included in the Sales Intelligence Reports. For example, if the status code Offered has the Enabled, Open, and Include in Forecast checkboxes selected, the Used For Opportunity checkbox selected, and the

Win Loss Indicator specified, information on opportunities that use the Offered status will be included in the Won columns of the various Sales Intelligence reports.

Status Code values are maintained by your Oracle Field Sales system administrator in accordance with your local business process rules. See your system administrator for information on Sales Code values for the various Opportunity Status menu selections.

Table 1–3, "Opportunity Status Reporting" lists the categories of opportunity statuses used in the Opportunity Summary, Opportunity Analysis by Amount Bands, and Opportunity Analysis by Amount Bands (Trend) reports. In the Opportunity Detail report, which shows live data, values are they exist in Oracle Field Sales, not summarized data.

Table 1–3 Opportunity Status Reporting

Opportunity Status Categories	Open/Closed	Win/Lost/ Neither	Included in Forecast
Open	O	N	Yes
Won	C	W	Yes. An opportunity is automatically included in the forecast ("forecastable") if the Open/Closed and Win/Lost/Neither flags are selected.
Lost	C	L	No
No Opportunity	C	N	No

See the *Oracle Field Sales User Guide* for details.

1.9 Values in Reports

The values in the Sales Intelligence reports are handled as described in this subsection.

Section 1.9.1, "Factoring Values in Reports"

Section 1.9.2, "Decimal Places"

Section 1.9.3, "Null Values"

1.9.1 Factoring Values in Reports

Factoring means to apply thousands or millions to a number. For example, 10,000 would be factored to 10, with a note indicating that all currency amounts are in thousands. Other values, such as percent, ratio, quantity, and count might not be factored.

1.9.2 Decimal Places

Decimal places are handled differently depending on the value expressed.

- **Percent, Ratio, Margin, and other Calculated Measures:** Percentages, margins, ratios and other calculated measures are displayed with one decimal place.
- **Currency Values:** There are two decimal places used for Currency values.
- **Quantities, Counts, and Days:** Quantities, counts, and days are expressed as whole numbers with no decimal places

1.9.3 Null Values

Null values are represented in Sales Intelligence reports as either NA or 0, depending on the conditions listed in Table 1–4, "Null Value Representation Conditions".

Table 1–4 Null Value Representation Conditions

Current Value	Show Current Value As	Performance Measure Calculation
NA	NA	NA
0	NA	NA

1.10 Refreshing Data in Reports

Only the system administrator can refresh the underlying data set for the reports. To update the underlying data set, the administrator must run an incremental refresh request set.

Your system administrator should schedule the incremental refresh request sets daily or at another regular interval. If you suspect that your data is out of date or there is another problem with your data, contact your system administrator.

1.11 New in this Release

This document describes functionality to be delivered in the Oracle E-Business Suite 11.5.10 release. If you are implementing this product prior to the release, using product minipacks or family packs, some new functionality may be dependent on integration with other Oracle products. Please consult MetaLink for relevant product patches and documentation.

The following new features have been added to Oracle Sales Intelligence in this release.

- Section 1.11.1, "New Reports for Opportunity Management and Product Management"
- Section 1.11.2, "Product Category and Territory Filtering in Previously-Released Sales Intelligence Reports - Removed for Release 11.5.10"
- Section 1.11.3, "Previously-Released Sales Intelligence Reports that are Available in 11.5.10"
- Section 1.11.4, "Rewritten Reports"
- Section 1.11.5, "New Sales Group Security on Data Viewing"
- Section 1.11.6, "Consistent Counts and Amounts for Data Rollup"
- Section 1.11.7, "Product Hierarchy Included in 11.5.10 Sales Intelligence"

1.11.1 New Reports for Opportunity Management and Product Management

There are nine new Sales Intelligence reports released with 11.5.10, which replace 48 of 98 of the pre-11.5.10 Sales Intelligence reports. These new reports are:

Table 1–5 New Sales Intelligence Reports

Business Functional Area	Sales Intelligence Reports
Opportunity Management	Opportunity Summary
	Opportunity Analysis by Amount Bands
	Opportunity Analysis by Amount Bands (Trend)
	Opportunity Win/Loss Analysis
	Opportunity Win/Loss Analysis (Trend)
	Opportunity by Prospect or Customer (Trend)
	Opportunity Detail
Product Management	Top/Bottom Products
	Product Pipeline and Sales Growth (Trend)

1.11.2 Product Category and Territory Filtering in Previously-Released Sales Intelligence Reports - Removed for Release 11.5.10

Some of the Sales Intelligence reports that were implemented in previous releases are still valid and in use. However, the product category filtering for these reports has been removed as of release 11.5.10. This filtering includes:

- Product line
- Product family
- Product group

Also, Territory filtering has been removed for release 11.5.10 for the previously-released reports. However, this release still use the Territory Assignment Interface Tables for customer, Quote and Order information.

1.11.3 Previously-Released Sales Intelligence Reports that are Available in 11.5.10

The previously-released reports that are still available to customers as of 11.5.10, and are listed after the 11.5.10 reports in the application. See the *Oracle Sales Intelligence User Guide*, 11.5.8 release, for details on these reports.

- Customer Activity Number of Lead Detail
- Customer Activity Number of Opportunities Detail
- Customer Activity Number of Orders Detail
- Customer Activity Number of Quotes Detail
- Customers at Risk Weighted Overall Rank
- Customers at Risk Customer Satisfaction Detail
- Customers at Risk Forecasted Revenue Detail
- Customers at Risk Sales Revenue Detail
- Customers at Risk Service Requests Detail
- Top/Bottom Customers Weighted Overall Rank
- Top/Bottom Customers Average Amount per Order Detail
- Top/Bottom Customers Forecasted Revenue Detail
- Top/Bottom Customers Low Return Rate Detail
- Top/Bottom Customers Sales Revenue Detail

- Average Revenue Per Order by Customer
- Average Revenue Per Order by Sale Channel
- Gross Margins by Customer
- Gross Margins by Period
- Gross Margins by Sales Channel
- Revenue Growth by Customer
- Revenue Growth by Sales Channel
- Top/Bottom Sales Channels Weighted Overall Rank
- Top/Bottom Sales Channels Customer Satisfaction Detail
- Top/Bottom Sales Channels Gross Margin Detail
- Top/Bottom Sales Channels Ratio of Leads to Order Detail
- Top/Bottom Sales Channels Sales Revenue Detail
- Top/Bottom Sales Channels Units Sold Detail
- Top/Bottom Sales Channels Win/Loss Ratio Detail
- Return on Compensation by Compensation Plan
- Return on Compensation by Role
- Return on Compensation by Salesperson
- Top/Bottom Performers Weighted by Overall Rank
- Top/Bottom Performers Close Ratio Detail
- Top/Bottom Performers Compensation Amount Detail
- Top/Bottom Performers Gross Margins Detail
- Top/Bottom Performers Revenue Credit Detail
- Top/Bottom Performers Sales Cycle Time Detail
- Top/Bottom Performers Sales Revenue Detail
- Top/Bottom Performers Units Sold Detail

1.11.4 Rewritten Reports

The Sales Intelligence reports have been extensively rewritten and reformatted. Their format now resembles that of Sales Intelligence DBI reports. The new reports have report-specific parameters, graphs of various types, and tables of data. They also include links to related reports.

Also, Oracle Sales Intelligence now uses the Performance Management Viewer (PMV) and Performance Management Framework (PMF) reporting architectures (based on the OA framework) to define and render the new Sales Intelligence reports. These technologies are now prerequisites for Oracle Sales Intelligence. See the *Oracle E-Business Intelligence Daily Business Intelligence User Guide* for details on PMV and PMF.

1.11.5 New Sales Group Security on Data Viewing

Data access to the Oracle Sales Intelligence reports is secured by the Sales Group hierarchy. The report parameters Sales Group and Period Type, From Period, and To Period secure data by time, sales group, product, and product category.

The hierarchical access by sales group enables executives to view sales reports down through their entire organization. Each sales manager has a view of data on their level and below, as the hierarchy is traversed downward.

Most reports use a hierarchical list of values in the Sales Group field, which shows the recursive nature of the sales group hierarchy, with an indication of the parent-child-peer relationships. The group with the star next to it is the highest group level for the logged in user. For example, the hierarchy shown for a first-time login:

*Worldwide Sales

- - US Sales
- - EMEA Sales
- - APAC Sales
- - SA Sales
- - Canada Sales

For example, for subsequent logins:

Parent group: *Worldwide Sales

Peer groups:
- - US Sales
- - EMEA Sales-
- - APAC Sales

- - SA Sales
- - Canada Sales

Self group: - - US Sales

Child groups:
 - - - - Eastern States Sales
- - - - Midwest Sales
- - - - Pacific Coast Sales

The Opportunity Detail report (a live report) uses an expanded list of values to give you direct access to sales region data. For example:

All
APAC Sales
Canada Sales
EMEA Sales
Industry Accounts
Key Accounts
Mid-Market Accounts
SA Sales
US Sales
Worldwide Sales

1.11.6 Consistent Counts and Amounts for Data Rollup

The 11.5.10 Oracle Sales Intelligence reports use data rollup model to prevent the double counting of data. For example, if a sales opportunity is split between representatives in two sales groups. The sales opportunity will be counted as one opportunity for the higher-level Sales Group manager, despite being split between the two chile sales groups in terms of sale credits.

1.11.7 Product Hierarchy Included in 11.5.10 Sales Intelligence

For release 11.5.10, Oracle Sales Intelligence uses the new Product Hierarchy, supported by Product Lifecycle Management (PLM).

1.12 Obsolete in this Release

These Territory Assignment Program-related reports have been discontinued (are not replaced by 11.5.10 Sales Intelligence reports):

- Average Revenue Per Order by Territory

- Revenue Growth by Territory
- Gross Margins by Territory
- Sales Cycle Length by Territory
- Win/Loss Analysis by Territory

Table 1–6, "Mapping 11.5.9 Reports to New 11.5.10 Reports" lists obsolete 11.5.9 reports and maps them to the new 11.5.10 report s.

Table 1–6 Mapping 11.5.9 Reports to New 11.5.10 Reports

Obsolete 11.5.9 Report Name	New11.5.10 Report Name
Opportunity Detail	Opportunity Detail
Pipeline Detail	Opportunity Detail
Pipeline Salesperson Summary by Sales Channel	Opportunity Summary
Pipeline Salesperson Summary by Sales Stage	Opportunity Summary
Pipeline Salesperson Summary by Sales Status	Opportunity Summary
Pipeline Summary by Sales Channel	Opportunity Summary
Pipeline Summary by Sales Stage	Opportunity Summary
Pipeline Summary by Sales Status	Opportunity Summary
Risky Opportunities Weighted Overall Rank	Opportunity Summary
Risky Opportunities Customer Satisfaction Overall	Opportunity Summary
Valuable Opportunities Weighted Overall Rank	Opportunity Summary
Valuable Opportunities Opportunity Amount Detail	Opportunity Summary
Valuable Opportunities Sales Revenue Detail	Opportunity Summary
Valuable Opportunities Win Probability Detail	Opportunity Summary
Top/Bottom Selling Product Families Weighted by Overall Rank	Top/Bottom Products
Top/Bottom Selling Product Families Close Ratio Detail	Top/Bottom Products
Top/Bottom Selling Product Family Forecasted Revenue Detail	Top/Bottom Products
Top/Bottom Selling Product Families Gross Margin Detail	Top/Bottom Products

Table 1–6 Mapping 11.5.9 Reports to New 11.5.10 Reports (Cont.)

Obsolete 11.5.9 Report Name	New11.5.10 Report Name
Top/Bottom Selling Product Families Sales Cycle Time Detail	Top/Bottom Products
Top/Bottom Selling Product Families Sales Revenue Detail	Top/Bottom Products
Top/Bottom Selling Product Families Units Sold Detail	Top/Bottom Products
Top/Bottom Selling Product Groups Weighted Overall Rank	Top/Bottom Products
Top/Bottom Selling Product Groups Close Ratio Detail	Top/Bottom Products
Top/Bottom Selling Product Groups Forecasted Revenue Detail	Top/Bottom Products
Top/Bottom Selling Product Groups Gross Margin Detail	Top/Bottom Products
Top/Bottom Selling Product Groups Sales Cycle Time Detail	Top/Bottom Products
Top/Bottom Selling Product Groups Sales Revenue Detail	Top/Bottom Products
Top/Bottom Selling Product Groups Units Sold Detail	Top/Bottom Products
Top/Bottom Selling Product Lines Weighted Overall Rank	Top/Bottom Products
Top/Bottom Selling Product Lines Close Ratio Detail	Top/Bottom Products
Top/Bottom Selling Product Lines Forecasted Revenue Detail	Top/Bottom Products
Top/Bottom Selling Product Lines Gross Margin Detail	Top/Bottom Products
Top/Bottom Selling Product Lines Sales Cycle Time Detail	Top/Bottom Products
Top/Bottom Selling Product Lines Sales Revenue Detail	Top/Bottom Products
Top/Bottom Selling Product Lines Units Sold Detail	Top/Bottom Products

Table 1–6 Mapping 11.5.9 Reports to New 11.5.10 Reports (Cont.)

Obsolete 11.5.9 Report Name	New11.5.10 Report Name
Average Revenue Per Order by Period	Product Pipeline and Sales Growth (Trend)
Average Revenue Per Order by Product Family	Top/Bottom Products
Average Revenue Per Order by Product Group	Top/Bottom Products
Average Revenue Per Order by Product Line	Top/Bottom Products
Gross Margins by Product Family	Top/Bottom Products
Gross Margins by Product Group	Top/Bottom Products
Gross Margins by Product Line	Top/Bottom Products
Revenue Growth by Product Family	Product Pipeline and Sales Growth (Trend)
Revenue Growth by Product Group	Product Pipeline and Sales Growth (Trend)
Revenue Growth by Product Line	Product Pipeline and Sales Growth (Trend)
Sales Cycle Length by Product Family	Top/Bottom Products
Sales Cycle Length by Product Group	Top/Bottom Products
Sales Cycle Length by Product Line	Top/Bottom Products
Sales Cycle Length by Sales Channel	Opportunity Win/Loss Analysis
Sales Cycle Length by Salesperson	Opportunity Win/Loss Analysis
Win/Loss Analysis by Product Family	Opportunity Summary
Win/Loss Analysis by Product Group	Opportunity Summary
Win/Loss Analysis by Product Line	Opportunity Summary
Win/Loss Analysis by Salesperson	Opportunity Summary

1.13 Accessing Oracle Sales Intelligence

Prerequisites

Oracle Field Sales/TeleSales, Release 11.5.10 has been implemented

Login

Log in to Oracle HTML Applications.

Responsibility

Sales Intelligence

Navigation

Personal Homepage > Sales Intelligence > Opportunity Management Reports or Product Management Reports

Steps

1. Click **Sales Intelligence**.
2. Click the report name to access the report.

2

Opportunity Management Reports

Sections in this chapter include:

- Section 2.1, "Overview of Opportunity Management Reports"
- Section 2.2, "Opportunity Summary"
- Section 2.3, "Opportunity Analysis by Amount Bands"
- Section 2.4, "Opportunity Analysis by Amount Bands (Trend)"
- Section 2.5, "Opportunity Win/Loss Analysis"
- Section 2.6, "Opportunity Win/Loss Analysis (Trend)"
- Section 2.7, "Opportunity by Prospect or Customer (Trend)"
- Section 2.8, "Opportunity Detail"

2.1 Overview of Opportunity Management Reports

These reports provide opportunity pipeline management information to sales managers or top executives, and provide a summarized and comparative view of subordinate Sales Group performances in the reporting chain, all the way down to individual sales representatives. Also, if individual product performance is of concern, managers can switch the 'View By' to 'Product Category' to view data summarized along the Product dimension.

The report descriptions in this chapter include details on how the data in applicable report columns was derived from data in Oracle Field Sales. This is indicated through the description of the various checkbox and radio button settings in the Status Code Values window in Oracle Field Sales. See Section 1.3, "Oracle Sales Intelligence Integrations" for details.

The Opportunity Management reports include:

- Opportunity Summary
- Opportunity Analysis by Amount Bands
- Opportunity Analysis by Amount Bands (Trend)
- Opportunity Win/Loss Analysis
- Opportunity Win/Loss Analysis (Trend)
- Opportunity Acquisition by Prospect or Customer (Trend)
- Opportunity Detail

2.2 Opportunity Summary

You can use the report to view:

- Comparison of Total Opportunity and Pipeline amounts among subordinate sales groups or representatives. The report also displays an alternative View By selection (product category) to enable you to view data by products that are selling.
- Breakdown of opportunity amounts and respective percentages by opportunity statuses (Open, Won Lost, No Opportunity), viewed by subordinate sales groups or representatives, or by product categories.
- Win/loss ratio calculated for each subordinate sales group or representative, or by product category.

This report sorts by Sales Group, ascending alphabetically. All columns are sortable. Click on the arrow in the column heading to sort the data.

2.2.1 Report-Specific Parameters

This report uses the following parameters in addition to common report parameters discussed in Common Report Parameters in Chapter 1:

- **Sales Channel:** Sales channel that generated the opportunity (direct or indirect, for example). The default value is All.
- **Sales Stage:** Sales stage related to the opportunity. For example, Prospect or Qualify. The default value is All.
- **View By:** Allows the Opportunity Summary Report to be viewed by either Sales Group or Product Category. The default value is Sales Group.

2.2.2 Headings

This report contains the following headings:

- **Sales Group or Product Category:** This column displays the names of the subordinates (sales groups or individuals) of the sales group selected in the navigation area or, if View By Product Category is selected, the product categories.

  Sales Group or Product Category rows are links that enable you to view data exactly as per the original report, but showing the child values of the sales group or product category.

- **Total Opportunity:** The sum of opportunity total amounts with a close or decision date in the selected period. This amount should be the sum of the Open amount, Won amount, Lost amount, and No Opportunity amount. See Table 1–3, "Opportunity Status Reporting" for details.

- **Pipeline:** The sum of opportunity sales credits with:
  - Close or decision in the selected period
  - With Won and Open statuses
  - **Include in Forecast** checkbox selected

    Won opportunities are also included in the pipeline as well as open opportunities.

- **Open:** The sum of opportunity sales credits with:
  - Close or decision date within the selected period
  - **Include in Forecast** checkbox selected
  - **Open** checkbox selected

    You can change the sort order of this column.

- **Open% of Total:** This calculation is used to derive this percentage:

  (Open Opportunity Amount/Total Opportunity Amount) *100

- **Won:** The sum of opportunity sales credits that have the:
  - Close or decision date within the selected period
  - **Open** checkbox not selected (opportunity is closed)
  - Win is the selected Win Loss Indicator (opportunity is won)

- **Won% of Total:** This calculation is used to derive this percentage:

  (Won Opportunities/Total Opportunity Amount) *100

- **Lost:** The sum of opportunity sales credits that have the:
  - Close or decision date within the selected period
  - **Open** checkbox not selected (opportunity is closed)
  - Lost is the selected Win Loss Indicator (opportunity is lost)
- **Lost% of Total:** This calculation is used to derive this percentage:

  (Lost Opportunities/Total Opportunity Amount) *100

- **No Opportunity:** The sum of the sales credit amount of all opportunities that have the:
  - Close or decision date within the selected period
  - **Open** checkbox not selected (opportunity is closed)
  - Neither is the selected Win Loss Indicator (there is no opportunity)
- **No Opportunity% of Total:** This calculation is used to derive this percentage:

  (No Opportunities/Total Opportunity Amount) *100

- **Win/Loss Ratio:** This calculation is used to derive this ratio:

  (Won Amount / Lost Amount)

  Won and Lost opportunities must have close dates within the current selected period. The ratio figure is to be displayed to one decimal place.

2.2.3 Graphs

The following graphs are contained in this report:

Table 2–1 Opportunity Summary Report Graphs

Graph	Description
Opportunity Amount	Stacked bar chart showing the opportunity amounts contribution by individual subordinate sales group/sales representatives or product category. Data Series/Measures: ■ Open, Lost, Won, No Opportunity Legends: ■ Sales Group/Product Category Axes: ■ Y1 - Amount ■ X - Sales Group or Product Category View By values
Percentage of Total Opportunity	Clustered vertical bar chart showing the percentage of each opportunity status in subordinate sales group/sales representative or product category. Data Series/Measures: ■ Open% of Total, Won% of Total, Lost% of Total, No Opportunity% of Total by Sales Group or Product Category View By values Legends: ■ Open% of Total ■ Won% of Total ■ Lost% of Total ■ No Opportunity% of Total Axes: ■ Y1 - Percentage ■ X - Sales Group or Product Category View By values

2.3 Opportunity Analysis by Amount Bands

You can use the report to view:

- Total opportunity dollar amount, opportunity count and average opportunity size in each opportunity band, viewed by subordinate sales groups or product categories
- Niche market size or segment for the company as a whole or the individual subordinate sales groups/resources
- Size of opportunity that each product category might generate

This report sorts .by Sales Group or Product Category, ascending alphabetically. All columns are sortable. Click on the arrow in the column heading to sort the data.

2.3.1 Report-Specific Parameters

This report uses the following parameters in addition to common Opportunity Management report parameters:

- **Sales Channel:** Sales channel that generated the opportunity (direct or indirect, for example). The default value is All.
- **Sales Stage:** Sales stage related to the opportunity. For example, Prospect, Qualify. The default value is All.
- **Opportunity Status:** Status of the opportunity category. The default value is All. See Table 1–3, "Opportunity Status Reporting" for details.
- **View By:** Allows the Opportunity Analysis by Amount Bands Report to be viewed by either Sales Group or Product Category. The default value is Sales Group.

2.3.2 Headings

This report contains the following headings:

- **Sales Group or Product Category:** This column displays the names of the subordinates (sales groups or individuals) of the sales group selected in the parameter area or, if View By Product Category is selected.

  Sales Group or Product Category rows are links to report displays exactly as per the original report but with the child values of the sales group or product category

- **Opportunity Dollar Amount Bands:** The following bands are provided by default:
  - More than 10M
  - 10M - 5M
  - 5M - 1M
  - Less than 1M

  These bands are lower bound inclusive (>=) and upper bound non-inclusive (<).
- **Amount:** The sum of opportunity sales credits of opportunities with:
  - Close or decision date within the selected period

  Amounts are displayed for each band.
- **Count:** The count of opportunities belonging to each band, of which the subordinate sales group or resource have sales credits. Counts are shown for each band.
- **Average:** This calculation is used to derive the average of each band:

  (Amount/Count)

  Averages are shown for each band.

2.3.3 Graphs

The following graphs are contained in this report:

Table 2–2 Opportunity Analysis by Amount Bands Report Graphs

Graph	Description
Amount	Vertical stacked bar charts for opportunity band amounts, displaying the percentage contribution from subordinate sales groups/resources or products within each data band. Data Series/Measures: ■ Amount columns from subordinate sales groups/resources or products within respective data buckets Legends: ■ Opportunity Bands Axes: ■ Y1 - Currency Amount ■ X - Subordinate sales groups/resources or products
Count	Horizontal stacked bar chart for opportunity counts within each band by subordinate sales groups/resources or by products. Data Series/Measures: ■ Count columns from subordinate sales groups/resources or products within respective data bands Legends: ■ Opportunity Bands Axes: ■ Y1 - Subordinate sales groups/resources or products ■ X - Number (Count)

Table 2–2 Opportunity Analysis by Amount Bands Report Graphs (Cont.)

Graph	Description
Average	Vertical clustered bar chart for average opportunity amounts within each band by subordinate sales groups/resources or by products. Data Series/Measures: ■ Average amount columns from subordinate sales groups/resources or products within respective data bands Legends: ■ Opportunity Bands Axes: ■ Y1 - Currency Amount ■ X - Subordinate sales groups/resources or products

2.4 Opportunity Analysis by Amount Bands (Trend)

You can use the report to view trends in each opportunity band, viewed by different period types (month, quarter, or year) over a selected time frame.

This report sorts by time, ascending by time. None of the columns are sortable.

2.4.1 Report-Specific Parameters

This report uses the following parameters in addition to common Opportunity Management report parameters:

- **Period:** Shows available period values in Month, Quarter, or Year (depending on the selected Period Type). For future periods:
  - **Month:** System date + 12 months
  - **Quarter:** System date + 4 quarters
  - **Year:** System date + 1 year

    The number of data points displayed (including the selected period value)
  - **Month:** Prior 12 months
  - **Quarter:** Prior 8 quarters
  - **Year:** Prior 4 years
- **Sales Channel:** Sales channel that generated the opportunity (direct or indirect, for example). The default value is All.
- **Sales Stage:** Sales stage related to the opportunity. For example, Prospect or Qualify. The default value is All.
- **Opportunity Status:** Status of the opportunity category. The default value is All. See Table 1–3, "Opportunity Status Reporting" for details.

2.4.2 Headings

This report contains the following headings:

- **Period Type:** Shows the time period; this corresponds to the period type selected in the report parameters. Supported period types are: Month, Quarter, or Year.
- **Opportunity Dollar Amount Bands:** The following columns are set up by default:

- More than 10M
- 10M - 5M
- 5M - 1M
- Less than 1M

These bands are lower bound inclusive (>=) and upper bound non-inclusive (<).

- **Amount:** The sum of opportunity sales credits of opportunities with:
  - Close or decision date within the selected period
- **Count:** The count of opportunities belonging to each band, of which the subordinate sales group or resource have sales credits. Counts are shown for each band.
- **Average:** This calculation is used to derive the average of each band:

  (Amount/Count)

  Averages are shown for each band.

2.4.3 Graphs

The following graphs are contained in this report:

Table 2–3 Opportunity Analysis by Amount Bands (Trend) Report Graphs

Graph	Description
Amount Trend	Vertical stacked bar charts for opportunity band amounts, displaying the filtered opportunity amount for the periods, contributed by subordinate sales groups/resources or products within each data band. Data Series/Measures: ■ Amount columns from subordinate sales groups/resources or products within respective data bands for the selected time period Legends: ■ Opportunity Bands Axes: ■ Y1 - Currency Amount ■ X - Time Periods

Table 2–3 Opportunity Analysis by Amount Bands (Trend) Report Graphs (Cont.)

Graph	Description
Count Trend	Horizontal stacked bar chart for opportunity counts within each band by subordinate sales groups/resources or by products. Data Series/Measures: ■ Count columns from subordinate sales groups/resources or products within respective data buckets for the selected time period Legends: ■ Opportunity Bands Axes: ■ Y1 - Number (Count) ■ X - Time Periods
Average Trend	Vertical clustered bar charts for average opportunity amounts within each band by subordinate sales groups/resources or by products. Data Series/Measures: ■ Average amount columns from subordinate sales groups/resources or products within respective data bands Legends: ■ Opportunity Bands Axes: ■ Y1 - Currency Amount ■ X - Time Periods

2.5 Opportunity Win/Loss Analysis

You can use this report to view:

- Win opportunity amounts and counts attributable to different opportunity close reasons, competitors, sales stages, sales channels, and sales groups.
- Loss opportunity amounts and counts attributable to different opportunity close reasons, competitors, sales stages, sales channels, and sales groups.
- Win/Loss ratio calculated for different opportunity close reasons, competitors, sales stages, sales channels, and sales groups.

This report sorts by Close Reason, Competitor, Sales Stage, Sales Channel, or Sales Group (first default is Sales Group), ascending alphabetically. All columns are sortable. Click on the arrow in the column heading to sort the data.

2.5.1 Report-Specific Parameters

This report uses the following parameter in addition to common Opportunity Management report parameters:

- **View By:** Allows the Opportunity Win/Loss Analysis Report to be viewed by these additional values:
  - Close Reason
  - Competitor
  - Sales Stage
  - Sales Channel
  - Sales Group

The default is Sales Group.

2.5.2 Headings

This report contains the following headings:

Close Reason, Competitor, Sales Stage, Sales Channel, Sales Group: This column refreshes dynamically based on the View By parameter value selected. Some purchase lines might not have the Sales Channel or Competitor assigned; these purchase lines will summarized under Unassigned values in this case. The default value is Sales Group.

- **Win Amount:** The sum of opportunity sales credits that have the:

  - Close date within the selected period
  - **Open** checkbox is not selected (opportunity is closed)
  - **Win** is the selected Win Loss Indicator (opportunity is won)
- **Win% of Total:** This calculation is used to derive this percentage:

  (Win Amount/Total Win Amount/Total Win Amount)*100
- **Win Count:** The number count of Won opportunities, which has the specific Close Reason, Competitor, Sales Stage, Sales Channel, and Sales Group.
- **Loss Amount:** The sum of opportunity sales credits that have the:
  - Close date within the selected period
  - **Open** checkbox is not selected (opportunity is closed)
  - **Loss** is the selected Win Loss Indicator (opportunity is lost)
- **Loss% of Total:** This calculation is used to derive this percentage:

  (Loss Amount/Total Loss Amount) * 100
- **Loss Count:** The number count of Loss opportunities, which has the specific Close Reason, Competitor, Sales Stage, Sales Channel, and Sales Group.
- **Win/Loss Ratio:** This calculation is used to derive this ratio:

  (Won Amount / Loss Amount)

  Won and Lost opportunities must have close dates within the current selected period. The ratio figure is to be displayed to one decimal place.
- **Average Sales Cycle:** The average sales cycle length for each of the values returned in the result, in days. This cycle uses time and date in its calculation:

  SUM (Close/Decision Date and Time - Creation Date and Time)/ total number opportunities satisfying the parameter conditions, whether opportunity is won or lost

2.5.3 Graphs

The following graphs are contained in this report:

Table 2–4 Opportunity Win/Loss Report Graphs

Graph	Description
Win by Close Reason/Key Competitor/Sales Stage/Sales Channel/Sales Group	Multiple Pie charts for Win opportunity Amount and Count. Shows the percentage contribution from each by Close Reason, Competitor, Sales Stage, Sales Channel, or Sales Group value, depending on the chosen View By value. The graph title changes dynamically based on the chosen View By value. Data Series/Measures: ■ Pie 1 - Win Amount column from each View By value ■ Pie 2 - Win Count column from each View By value Legends: ■ View By values Axes: ■ Y1 - Percent ■ X - View By values
Loss by Close Reason/Key Competitor/Sales Stage/Sales Channel/Sales Group	Multiple Pie charts for Loss opportunity Amount and Count. Shows the percentage contribution from each by Close Reason, Competitor, Sales Stage, Sales Channel, or Sales Group, depending on the chosen View By value. The graph title changes dynamically based on the chosen View By value. Data Series/Measures: ■ Pie 1 - Loss Amount column from each View By value ■ Pie 2 - Loss Count column from each View By value Legends: ■ View By values Axes: ■ Y1 - Percent ■ X - View By values

2.6 Opportunity Win/Loss Analysis (Trend)

You can use this report to view Win/Loss ratio and Win/Loss amounts and counts by specified time frames.

This report sorts by time, ascending by time. None of the columns are sortable

2.6.1 Report-Specific Parameters

This report uses the following parameters in addition to common Opportunity Management report parameters:

- **Period:** Shows available period values in Month, Quarter, or Year (depending on the selected Period Type). For future periods:
  - **Month:** System date + 12 months
  - **Quarter:** System date + 4 quarters
  - **Year:** System date + 1 year

  The number of data points displayed (including the selected period value)
  - **Month:** Prior 12 months
  - **Quarter:** Prior 8 quarters
  - **Year:** Prior 4 years

2.6.2 Headings

This report contains the following headings:

- **Period Type:** Shows the time period; this corresponds to the period type selected in the report parameters. Period types are: Month, Quarter, or Year.
- **Win Amount:** The sum of opportunity sales credits that have the:
  - Close date within the selected period
  - **Open** checkbox is not selected (opportunity is closed)
  - **Win** is the selected Win Loss Indicator (opportunity is won)
- **Win% of Total Opportunity:** This calculation is used to derive this percentage:

  (Period Win Amount/Total Opportunity Amount for the Period)*100
- **Win Count:** The number count of Won opportunities, which has the specific Close Reason, Competitor, Sales Stage, Sales Channel, Sales Group set.

- **Loss Amount:** The sum of opportunity sales credits that have the:
  - Close date within the selected period
  - **Open** checkbox is not selected (opportunity is closed)
  - **Loss** is the selected Win Loss Indicator (opportunity is lost)
- **Loss% of Total Opportunity:** This calculation is used to derive this percentage:

  (Period Loss Amount/Total Opportunity Amount for the Period)*100
- **Loss Count:** The number count of Loss opportunities, which has the specific Close Reason, Competitor, Sales Stage, Sales Channel, and/or Sales Group set.
- **Win/Loss Ratio:** This calculation is used to derive this ratio:

  (Row Won Amount / Row Lost Amount)

  Won and Lost opportunities must have close dates within the current selected period. The ratio figure is to be displayed to one decimal place.
- **Average Sales Cycle:** The average sales cycle length for each of the values returned in the result, in days. This cycle uses time and date in its calculation:

  SUM (Close/Decision Date and Time - Creation Date and Time)/ total number opportunities satisfying the parameter conditions, whether opportunity is won or lost

2.6.3 Graphs

The following graphs are contained in this report:

Table 2–5 Opportunity Win/Loss Report Graphs (Trend)

Graph	Description
Win By Time	Line charts for Win Amount and Count graphed over time. Data Series/Measures: ■ Line 1 - Win Amount column ■ Line 2 - Win Count column Legends: ■ Win Amount ■ Win Count Axes: ■ Y1 - Number (Currency Amount) ■ Y2 - Number (Count) ■ X - Periods
Loss By Time	Line charts for Loss Amount and Count graphed over time. Data Series/Measures: ■ Line 1 - Loss Amount column ■ Line 2 - Loss Count column Legends: ■ Loss Amount ■ Loss Count Axes: ■ Y1 - Number (Currency Amount) ■ Y2 - Number (Count) ■ X - Periods

2.7 Opportunity by Prospect or Customer (Trend)

You can use this report to view an analysis of opportunity acquisition, amount and count, from existing customers and new prospects for the time period indicated.

This report sorts by time, ascending by time. None of the columns are sortable

2.7.1 Report-Specific Parameters

This report uses the following parameters in addition to common Opportunity Management report parameters:

- **Period:** Shows available period values in Month, Quarter, or Year (depending on the selected Period Type). For future periods:
  - **Month:** System date + 12 months
  - **Quarter:** System date + 4 quarters
  - **Year:** System date + 1 year

  The number of data points displayed (including the selected period value)
  - **Month:** Prior 12 months
  - **Quarter:** Prior 8 quarters
  - **Year:** Prior 4 years
- **Customer Category:** Customer category information entered for each customer. The default value is All.

2.7.2 Headings

This report contains the following headings:

- **Period Type:** Shows the time period; this corresponds to the period type selected in the report parameters. Period types are: Month, Quarter, or Year.
- **Prospect Count:** Count of Prospect, for which opportunities are created in the specific time period.
- **Prospect Opportunity Count:** Count of opportunities created for 'Prospect' parties in the specific time period.
- **Prospect Opportunity Amount:** Amount of opportunities created for 'Prospect' parties in the specific time period.

- **Customer Count:** Count of Customer, for which opportunities are created in the specific time period.
- **Customer Opportunity Count:** Count of opportunities created for 'Customer' parties in the specific time period.
- **Customer Opportunity Amount:** Amount of opportunities created for 'Customer' parties in the specific time period.

2.7.3 Graphs

The following graphs are contained in this report:

Table 2–6 Opportunity Acquisition by Prospect or Customer (Trend) Report Graphs

Graph	Description
Prospect Count Versus Customer Count	Line chart for Prospect Count and Customer Count. Displays the counts of Prospect and Customer, for which there is an opportunity created in the specified time periods. Data Series/Measures: ■ Prospect Count column for selected time period ■ Customer Count column for selected time period Legends: ■ Prospect ■ Customer Axes: ■ Y1 - Number (Count) ■ X - Time Periods

Table 2–6 Opportunity Acquisition by Prospect or Customer (Trend) Report Graphs

Graph	Description
Opportunity Count	Line chart for Prospect - Opportunity Count and Customer - Opportunity Count. Displays the filtered opportunity counts for the periods, contributed by Prospect or Customer. Data Series/Measures: ■ Prospect Count column for selected time period ■ Customer Count column for selected time period Legends: ■ Prospect ■ Customer Axes: ■ Y1 - Number (Count) ■ X - Time Periods
Opportunity Amount	Line chart for Prospect - Opportunity Amount and Customer - Opportunity Amount. Shows the filtered opportunity amounts for the periods, contributed by Prospect or Customer. Data Series/Measures: ■ Prospect Count column for selected time period ■ Customer Count column for selected time period Legends: ■ Prospect ■ Customer Axes: ■ Y1 - Currency Amount ■ X - Time Periods

2.8 Opportunity Detail

You can use this report to view an opportunity listing with critical opportunity information filtered by period type, sales channel, credit type, status, or other category. It displays live, real-time data from transactional tables (versus data stored in summary tables, as in the other Sales Intelligence reports).

This report sorts by Sales Group, ascending alphabetically. All columns are sortable. Click on the arrow in the column heading to sort the data.

Note: This report displays data pertaining to sales representatives with a status of Inactive as long as this sale representative is still receiving sales credit allocation.

2.8.1 Report-Specific Parameters

This report uses the following parameters in addition to common Opportunity Management report parameters:

- **Sales Channel:** Sales channel that generated the opportunity. The default value is All.
- **Sales Stage:** Sales stage related to the opportunity, for example, Prospect, Qualify. The default value is All.
- **Credit Type:** Credit Types set up for sales representatives to split credits of different kinds on opportunity lines. The default value is All.
- **Opportunity Status:** Status of the opportunity in Oracle Field Sales/TeleSales. For example, Open, Lost.
- **Win Probability:** Win Probability field on Opportunity Header. The values should be corresponding to the values in the Win Probability menu on Opportunity pages of the Field Sales application. The default value is All.
- **Competitor:** Key competitor field on Opportunity header. The values should be corresponding to the values in the Key Competitor menu on Opportunity pages of the Field Sales application. The default value is All.

2.8.2 Headings

This report contains the following headings:

- **Sales Group:** This column displays the names of the subordinates (sales groups or individuals) of the sales group selected in the navigation area.

- **Salesperson:** Names of sale representatives on the opportunities. The format is First Name Last Name.
- **Opportunity Name (Number):** Name and number of the opportunity.
- **Product Category:** The Product Category assigned on the Opportunity Purchase.
- **Credit Amount:** Sales Credit Amount to the Opportunity Total Amount for the purchase line Sales Credit.
- **Win Probability:** The opportunity win probability.
- **Weighted Amount:** Amount of the opportunity purchase lines multiplied by the Win Probability set at the opportunity.
- **Customer:** Customer for whom the opportunity was created.
- **Sales Channel:** Sales channel that generated the opportunity.
- **Competitor:** Key competitor field on Opportunity header. The values should be corresponding to the values in the Key Competitor menu on Opportunity pages of the Field Sales application.
- **Sales Stage:** Sales stage related to the opportunity, for example, Prospect, Qualify.
- **Status:** Status of the opportunity.
- **Close Date:** Close or decision date of the opportunity.

3

Product Management Reports

Sections in this chapter include:

- Section 3.1, "Overview of Product Management Reports"
- Section 3.2, "Top/Bottom Products"
- Section 3.3, "Product Pipeline and Sales Growth (Trend)"

3.1 Overview of Product Management Reports

This group of reports allows users to view how each selling product performs against each other product. The Top/Bottom Products report shows the top or bottom selling products by certain performance measures, such as units sold, gross margin, or win/loss ratio. The Product Pipeline and Sales Growth (Trend) report shows the change of product selling momentum over time.

These reports include:

- Top/Bottom Products Report
- Product Pipeline and Sales Growth (Trend)

3.2 Top/Bottom Products

You can use the report to view top or bottom product categories or products reported by Sales, Pipeline, Units Sold, Win/Loss, and Average Sales Cycle performance measures.

This report sorts by View By Product Category, ascending alphabetically. All columns are sortable. Click on the arrow in the column heading to sort the data.

3.2.1 Report-Specific Parameters

This report uses the following parameters in addition to common report parameters discussed in Common Report Parameters in Chapter 1:

- **View:** Specifies the sorted display of Top or Bottom products. The default is Top.
- **Product:** Specific product to query. The default is All.
- **Rows:** Specifies the number of rows to display. Choices are 5, 10, 15 and 20. The default is 10. If there are ties in ranking, the report may display more rows that you request in this parameter. For example, if there are two top five values with the same rank of 5, six rows of data will be displayed to portray the top 5 values:

Table 3–1 Tie in Last Record

Value	Rank
128	1
56	2
55	3
10	4
8	5
8	5

Also, rank numbers can be skipped if the tie occurs in the middle of the sequence:

Table 3–2 Ties Result in Skipped Rank Numbers

Value	Rank
128	1

Table 3–2 Ties Result in Skipped Rank Numbers

Value	Rank
56	2
56	2
56	2
8	5
8	5

- **Report By:** Selects the measure that controls report content. Choices are Sales, Pipeline, Units Sold, Gross Margin%, Win/Loss, Average Sales Cycle. The default is Sales.
- **View by:** This parameter allows the report to be viewed by Product or Product Category. The default is Product Category.

3.2.2 Headings

This report contains the following headings:

- **Product or Product Category:** Product or Product Category displayed depends on the View By parameter value that was selected.
- **Sales:** Total sales amount of recognized revenue for a specific product.
- **Pipeline:** Total forecastable opportunity amounts for the product.
- **Units Sold:** Total units sold for the product category or product within the time periods.
- **Gross Margin%:** Calculated as follows for each customer:
  [(Sales - COGS)/Sales]*100
- **Win/Loss Ratio:** Ratio calculated as follows: (Total Win/Total Loss)
- **Average Sales Cycle:** The average sales cycle length for each of the values returned in the result, in days. This cycle uses time and date in its calculation:

  SUM (Close/Decision Date and Time - Creation Date and Time)/ total number opportunities

3.2.3 Graphs

The following graphs are contained in this report:

Table 3–3 Top/Bottom Products Report Graphs

Graph	Description
Sales and Pipeline	Multiple pie charts for Sales and Pipeline figures of individual product category or product. Data Series/Measures: ■ P1 - Sales column for individual product category or product ■ P2 - Pipeline column for individual product category or product Legends: ■ Product Category ■ product Axes: ■ Y1 - Percent ■ Y2 - N/A ■ X - Product Category or Product
Units Sold Versus Gross Margin	Split dual-Y axis charts for Units Sold and Gross Margin% of individual product category or product. Data Series/Measures: ■ Y1 - Bar Graph - Units Sold Column ■ Y2 - Line Graph - Gross Margin% Column Legends: ■ Units Sold ■ Gross Margin% Axes: ■ Y1 - Number ■ Y2 - Percent ■ X - Product Category or Product

Table 3–3 Top/Bottom Products Report Graphs (Cont.)

Graph	Description
Win/Loss Versus Average Sales Cycle	Split dual-Y axis charts for Win/Loss Ratio and Average Sales Cycle of individual product category or product. Data Series/Measures: ■ Y1 - Line Graph - Win/Loss Column ■ Y2 - Bar Graph - Average Sales Cycle Legends: ■ Win/Loss ■ Average Sales Cycle Axes: ■ Y1 - Number ■ Y2 - Number (days) ■ X - Product Category or Product

3.3 Product Pipeline and Sales Growth (Trend)

You can use the report to view the growth of pipeline and sales for each product category or product, viewed by different period types (month, quarter or year) over a selected time frame.

This report sorts by time, ascending by time. None of the columns are sortable.

3.3.1 Report-Specific Parameters

This report uses the following parameters in addition to common Product Management Report parameters:

- **Period:** Shows available period values in Month, Quarter, or Year (depending on the selected Period Type). For future periods:
  - **Month:** System date + 12 months
  - **Quarter:** System date + 4 quarters
  - **Year:** System date + 1 year

  The number of data points displayed (including the selected period value)
  - **Month:** Prior 12 months
  - **Quarter:** Prior 8 quarters
  - **Year:** Prior 4 years
- **Product:** Specific product to query. The default is All.

3.3.2 Headings

This report contains the following headings:

- **Period Type:** Shows the time period; this corresponds to the period type selected in the report parameters. Period types are: Month, Quarter, or Year.
- **Pipeline:** Amounts of the pipeline value corresponding to the Product Category or Product selected in the Product Category/Product parameters.
- **Sales:** Recognized revenue amount of the Sales value corresponding to the Product Category and/or Product selected in the Product Category/Product parameters.

3.3.3 Graphs

The following graphs are contained in this report:

Table 3–4 Product Pipeline and Sales Growth (Trend) Report Graphs

Graph	Description
Product Pipeline and Sales Growth	Line graph plotting the non-cumulative amount for each product category or product over the selected time periods. Data Series/Measures: ■ Pipeline and Sales amounts for each product category or product over the time period Legends: ■ Pipeline ■ Sales Axes: ■ Y1 - Currency ■ X - Time Periods