

Oracle® Fusion Transactional Business Intelligence 11.1.1.8.0

Sales - CRM Pipeline Subject Area

August 2014

Contents

Sales - CRM Pipeline..... 3

 Description..... 3

 This subject area can be used to answer business questions such as:..... 3

 The following job roles are used to secure access to this subject area:..... 3

 The following BI duty roles are used to secure access to this subject area: 3

 BI Product Offering 3

 BI Product Release 3

 Dimensions..... 4

 Facts 8

Sales - CRM Pipeline

Description

This is a key subject area that affords analysis across all stages of the sales cycle. Areas of analysis span lead management, opportunity pipeline management, win-loss, sales cycle, activities and quota management. Reports and other analyses created using this subject area are relevant for all key roles - sales reps, sales managers and sales executive as both individual and team performance can be assessed across resource and territory hierarchies. Depending on your requirements, the focus of analysis could be lead, opportunity, customer, competitor, sales resource/team or product, activity, territory or a combination of these. Due to the diversity of measures available in the subject, care should be exercised to include only dimensions that are relevant to chosen measures brought into the analysis.

This subject area can be used to answer business questions such as:

- Are my sales reps moving their opportunities fast enough?
- How is each member on my team performing on deal size, account coverage, and win rate?
- Is my sales team converting leads to opportunities fast enough?
- Is our overall pipeline healthy enough to meet sales goals?
- What are my top stalled opportunities and who are the sales reps working on these?
- What are the most likely reasons that we lose against our key competitors?
- What are the top 10 open opportunities? What are the target close dates and revenues for these?
- What is the buying trend of our biggest customers? Are there any up sell/cross sell opportunities?
- What is the value trend of high value opportunities? Do they show a positive or negative trend?
- Who are my top competitors and what is our revenue exposure to them?
- How effective are our current references? Has their participation meant a difference to us in wins?

The following job roles are used to secure access to this subject area:

- Sales Administrator
- Sales Manager
- Sales Representative
- Sales VP

The following BI duty roles are used to secure access to this subject area:

- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

BI Product Offering

Oracle® Fusion Transactional Business Intelligence

BI Product Release

Release 8

Dimensions

Dimension Folder Name	Description	Special Considerations	Fusion Navigation
Competitor	Attributes of competitor, such as Name and threat.		Navigate->Opportunities->Review Competitors->[Select a Competitor]->Edit Navigator->Customization->Application Composer->Standard Objects->Sales Competitor->Fields->Standard Navigator->Customization->Application Composer->Standard Objects->Sales Competitor->Fields->Custom
Competitor > Competitor – Additional Attributes	Additional attributes of competitor, such as type, status, location details, active/inactive.		Same as above
Contact	Attributes of customer’s contact, such as Name, Job Title, Phone and other key information.		Navigate->Customers->Manage Contacts->[Select a contact]->Edit Navigator->Customization->Application Composer->Standard Objects->Contact->Fields->Standard Navigator->Customization->Application Composer->Standard Objects->Contact->Fields->Custom
Contact > Contact – Additional Attributes	Folder to hold additional, less commonly used contact attributes.		Same as above
Currency	Used to prefix amounts with the user’s preferred currency.		N/A
Customer	Contains all key attributes of a customer.		Navigate->Customers->[Select a Customer]->Edit Navigator->Customization->Application Composer->Standard Objects->Account->Fields->Standard Navigator->Customization->Application Composer->Standard Objects->Sales Account->Fields->Standard
Customer > Customer – Additional Attributes	Folder to hold additional, less commonly used customer attributes.		Same as above
Customer Contact Profile	Stores contact profile attributes for an organization contact.		Navigator->Customization->Application Composer->Standard Objects->Customer Contact->Fields->Standard
Employee	Employee, often the sales resource.		Navigator->Customization->Application Composer->Standard Objects->Resource->Fields->Standard
Employee > Employee Organization	The internal org to which the employee belongs.		Same as above

Employee > Sales Resource Hierarchy	The reporting hierarchy in a sales org. Used to report on rolled up metrics.		Same as above
Historical Sales Stage	Attributes related to an opportunity's sales stage, such as name, phase, method, sales stage order.		Navigate->Opportunities->[Select an Opportunity]->[The sales method/stage field] Setup and Maintenance->[Search for "Manage Sales Methods and Sales Stages"]->Go to Task->[Select Standard Sales Process]->Edit
Industry	Attributes of the Industry to which the customer belongs.		Navigator->Customers->[Select the customer]->Industry Section
Interaction	Attributes pertaining to customer interaction such as meeting, email.		Navigator->Customization->Application Composer->Standard Objects->Interaction->Fields->Standard
Lead	Holds attributes of a sales lead.		Navigator->Customization->Application Composer->Standard Objects->Sales Lead->Fields->Standard
Marketing Source	Attributes related to marketing campaign such as Campaign Name, Region, and Status.		
Opportunity	Holds attributes of a sales lead.		Navigator->Customization->Application Composer->Standard Objects->Opportunity->Fields->Standard
Partner	Attributes related to the partner organization such as Partner Name, Status, and Level.		Navigate->Partners->[Select a Partner]->Edit Navigator->Customization->Application Composer->Standard Objects->Partner->Fields->Standard Navigator->Customization->Application Composer->Standard Objects->Partner->Fields->Custom
Product	Holds all attributes for a product including the product hierarchy.		Navigator->Customization->Application Composer->Standard Objects->Product Group->Fields->Standard
Reference	Attributes related to Customer Reference, such as Name, Rank, and Status.		Navigate->Customers->Manage References
Revenue	Holds all descriptive attributes for a Revenue line, often used with line level metrics.		Navigator->Customization->Application Composer->Standard Objects->Opportunity Revenue->Fields->Standard Navigate->Opportunities->[Select an Opportunity]->Revenue Item section
Sales Channel	Attributes related to the selling channel – which may be Direct (Field Sales/Telesales) or Indirect/Partner (VAD, VAR, Reseller and others).		N/A
Sales Goal	Attributes related to		Navigate->Territories and Quotas->Manage

	<p>Sales goals, which are essentially sales objectives shared by sales organization members. Sales goals may be revenue related (like Quota revenue) or non revenue related (like quantity of product to be sold). Quota is allocated in context to these sales goals.</p>		Sales Goal
Secondary Dates	Folder for the less commonly used dates in reporting.		N/A
Secondary Dates > Secondary Dates – Additional Attributes	Folder for the less commonly used attributes amongst secondary dates.		N/A
Territory	Holds all key attributes of the sales territory dimension.		Navigator->Customization->Application Composer->Standard Objects->Forecast Territory Details->Fields->Standard
Territory > Territory Hierarchy	Holds all hierarchical attributes of a sales territory.		Same as above
Time	<p>Contains all key attributes for the canonical date (driving date) for the subject area. Although this date is displayed in generic terms (unlike a 'Secondary Date'), it has a specific business meaning depending on the metric that is used, as follows:</p> <p>Pipeline facts – Expected Close Date of Opportunity.</p> <p>Pipeline Detail facts – Expected Close Date of Revenue Line.</p> <p>Sales Cycle facts/Win Loss facts - Expected Close Date of Opportunity or Revenue Line depending on whether it is a header or line level metric.</p> <p>Leads facts – Lead Creation Date.</p> <p>Interaction facts – Interaction Start Date.</p> <p>Activity facts – Activity Start Date.</p>		N/A

Time > Time – Additional Attributes	Contains additional attributes of Canonical/Driving Date.		N/A
-------------------------------------	---	--	-----

Facts

Fact Name	Description	Special Considerations
Activity Facts	The measure(s) under this folder is used to assess the level of sales activities performed by resources.	Activity facts are relevant for Fusion Sales Release 8.x and later. Activity measure(s) may be used with the following dimensions, while building new reports/analysis: Time (Activity Sort Date: Due date for Task, Start Date for Appt), Secondary Dates, Activity, Employee, Customer, Contact, Lead, Opportunity, Marketing Source.

Metric/Measure	Description/Meaning	Calculation – where applicable
# of Activities	Number of activities of all Activity Functions and Types.	

Fact Name	Description	Special Considerations
Interaction Facts	Folder that holds all measures related to customer interactions such as # of sales interactions, days since last interaction, etc.	Interaction facts are relevant only until Release 8 of Oracle Sales Cloud. They co-exist with Activities in Release 8 for the purpose of upgrade from previous releases. Activities replace Interactions and new customers should use Activities instead of Interactions. Combining Interactions and Activities facts in a single report is NOT supported.

Metric/Measure	Description/Meaning	Calculation – where applicable
# of Contacts with High Affinity	Number of high affinity customer contacts.	
# of Interactions	Number of all customer interactions of all types such as email, meeting, phone and others.	
# of Marketing Interactions	Number of customer interactions had for marketing purposes.	
# of Opportunity Interactions	Number of customer interactions associated with an opportunity.	
# of Sales Interactions	Number of customer interactions had for the purpose of sales.	
All Resource Avg Interactions	Number of interactions across all sales resources. Used for comparison between a single employee or specific set of employees and all others.	
Days Since Last Interaction	Number of days elapsed since the most recent customer interaction.	
Last Interaction Date for a Contact	Date on which a customer was last contacted and had interaction with.	

Fact Name	Description	Special Considerations
Lead Facts	Folder that holds all measures related to leads such as # of accepted leads, # of open leads, etc.	The metrics in this folder should be used with the following dimensions: Time, Lead, Customer, Customer Contact, Customer Contact Profile, Industry,

		Employee, Product, Territory, Auxiliary Classification 1, Auxiliary Classification 2, Auxiliary Classification 3, Organization Type, Currency, Sales Geography Zone and all Extensions of base dimensions listed above as applicable.
--	--	---

Metric/Measure	Description/Meaning	Calculation – where applicable
# Converted / # Qualified (%)	Number of converted leads expressed as a percentage of the number of qualified leads.	$100 * \# \text{ of Converted Leads} / \# \text{ of Qualified Leads}$
# Highly-Rank Qualified/# Qualified (%)	Number of highly ranked qualified leads expressed as a percentage of the number of qualified leads.	$100 * \# \text{ of Highly Qualified Leads} / \# \text{ of Qualified Leads}$
# Highly-Ranked Qualified Leads	Number of highly ranked qualified leads.	# of Qualified Leads where Rank is 'Hot'
# Low-Ranked Qualified Leads	Number of low ranked qualified leads.	# of Qualified Leads where Rank is 'Cool'
# Medium-Rank Qualified/# Qualified (%)	Number of medium ranked qualified leads expressed as a percentage of the number of qualified leads.	$100 * \# \text{ of Medium Qualified Leads} / \# \text{ of Qualified Leads}$
# Medium-Ranked Qualified Leads	Number of medium ranked qualified leads.	# of Qualified Leads where Lead Rank is 'WARM'
# of Accepted Leads	Number of leads accepted by the assignee.	# of Leads when Accepted Flag is 'Y'
# of Assigned Leads	Number of leads assigned to a sales group or sales representative.	# of Leads when Assignment Status is 'Assigned'
# of B2B Customer with Leads	Number of leads associated with business to business customers.	# of Customer with Leads where Party Type is 'ORGANIZATION'
# of B2C Customer with Leads	Number of leads associated with business to consumer customers.	# of Customer with Leads where Party Type is 'PERSON'
# of Contacts with Leads	Number of customer contacts that have at least one lead associated with them.	# of Primary Contacts that are associated with Leads
# of Customer Leads Converted	Number of leads already associated with customers that have been converted to an opportunity.	# of Leads from Customer where Status is 'Converted'
# of Customer with Leads	Number of customers who have at least one lead associated with them.	# of Customers that are associated with Leads
# of Lead Interactions	Number of customer interactions associated with a lead.	# of Interactions that are associated with Leads
# of Leads Converted	Number of leads converted to opportunities.	# of Leads where Status is 'Converted'
# of Leads from B2B Customer	Number of leads generated from business to business customers.	# of Leads from Customer where Party Type is 'ORGANIZATION'
# of Leads from B2C Customer	Number of leads generated from business to consumer customers.	# of Leads from Customer where Party Type is 'PERSON'
# of Leads from Campaign	Number of leads generated from marketing campaigns.	# of Leads generated from marketing campaigns
# of Leads from Customer	Number of leads created from existing customers.	# of Leads for Customer
# of Leads from Prospect	Number of leads created from prospects.	# of Leads for Prospect
# of Leads Generated from Marketing Source	Number of leads generated from marketing source – could be a marketing campaign.	# of Leads generated by any marketing activities
# of Leads Generated from Non Marketing Source	Leads generated from sources other than a marketing source.	# of Leads not generated by any marketing activities
# of Leads	Total number of leads.	# of Leads created
# of Open Leads	Number of leads that are 'Open', that is, not acted upon.	# of Leads where Status is 'Unqualified'

# of Prospect Leads Converted	Number of leads generated from prospects and converted to opportunities.	# of Leads from Prospect where Status is 'Converted'
# of Qualified Leads	Number of Leads that have been qualified.	# of Leads where Status is 'Qualified'
# of Rejected Leads	Number of Leads rejected.	# of Leads where Assignment Status is 'Rejected'
# of Retired Leads	Number of leads retired.	# of Leads where Status is 'Retired'
# of Unaccepted Leads	Number of assigned leads not yet accepted by sales persons.	# of Leads where Status is 'Unqualified' and Accepted Flag is 'N'
# of Unassigned Leads	Leads not assigned to any sales person to act upon.	# of Leads - # of Assigned Leads
# of Unconverted Leads	Number of leads which were not converted.	# of Leads - # of Leads Converted
# of Unqualified Leads	Number of leads that is yet to be qualified.	# of Leads where Status is 'Unqualified'
# Qualified / # Unqualified (%)	Ratio between qualified leads and unqualified leads.	$100 * \# \text{ of Qualified Leads} / \# \text{ of Unqualified Leads}$
# Qualified Leads not Followed up before Expiration	Total number of qualified leads that are not followed up before their expiry.	
# Retired / # Unqualified (%)	Number of retired leads expressed as a percentage of the number of unqualified leads.	$100 * \# \text{ of Retired Leads} / \# \text{ of Unqualified Leads}$
All Resource Leads to Opportunity Conversion (%)	Leads converted to opportunity, in % (Irrespective of resource hierarchy level).	
Average # of Days Open for Unqualified Leads	Average number of days that unqualified leads are open.	Average number of days from lead creation date to current date (report date) for unqualified leads
Average # of Days to Assign Leads	Average number of days took to assign the leads.	Average number of days from lead creation date to owner assigned date for assigned leads
Average # of Days to Convert Leads	Average number of days it took to covert the leads to opportunity.	Average number of days from lead creation date to owner assigned date for converted leads
Avg Lead Age (Days)	Average # of Days before the lead is converted/ rejected / retired. # of days lead is open until having a final outcome.	For resolved leads (lead status is 'Converted' or 'Retired'), this means that average number of days from lead creation date to the date on which lead is resolved (Converted or Retired). For other leads, this means that average number of days from lead creation date to current date (report date).
Estimated Revenue (Internal)	This metric is for internal use only.	
Estimated Revenue	Revenue estimated by Sales Prediction Engine (SPE). Applicable for leads generated by SPE.	Lead Item Average Revenue Amount for Leads that are generated by Sales Prediction Engine
Lead Qualification Rate (%)	Number of leads qualified expressed as a percentage of the total number of leads created.	$100 * \# \text{ of Qualified Leads} / \# \text{ of Leads}$
Leads to Opportunity Conversion (%)	Number of leads converted to opportunities expressed as a percentage of the total number of leads created.	$100 * \# \text{ of Converted Leads} / \# \text{ of Leads}$
Potential Revenue	This is the deal size entered on the transaction area of the screen for the lead.	Lead Deal Size
Rejected Leads (%)	Number of leads rejected expressed as a percentage of the total number of leads created.	$100 * \# \text{ of Rejected Leads} / \# \text{ of Leads}$
Retired Leads (%)	Number of leads retired expressed as a	$100 * \# \text{ of Retired Leads} / \# \text{ of Leads}$

	percentage of the total number of leads created.	
Total Market Potential	Total expected revenue from all open leads.	Total Lead Deal Size from Leads where Status is 'Qualified' or 'Unqualified'

Fact Name	Description	Special Considerations
Pipeline Detail Facts	This folder contains revenue measures at the opportunity line/revenue level.	Metrics from this folder are at the 'detail' level. They should be used with the following dimensions: Time, Secondary Dates, Customer, Contact, Customer Contact Profile, Industry, Employee, Product, Opportunity, Territory, Revenue, Auxiliary Classification 1, Auxiliary Classification 2, Auxiliary Classification 3, Customer Organization Type, Currency, Sales Geography Zone and all Extensions of base dimensions listed above as applicable.

Metric/Measure	Description/Meaning	Calculation – where applicable
# of Closed Opportunity Revenue Lines	Number of opportunity revenue lines which are closed-won. Only quota contributing revenue considered.	
# of Competitive Opportunity Revenue Lines	Number of opportunity revenue lines which have at least one competitor. Only quota contributing revenue considered.	
# of Open Opportunity Revenue Lines	Number of opportunity revenue lines which are in the 'open' status category. Only quota contributing revenue considered.	
# of Opportunities with Revenue Lines		
# of Opportunity Revenue Lines	Number of opportunity revenue lines of all statuses. Only quota contributing revenue lines considered.	
# of Products	Number of Products.	
Average Closed Opportunity Line Revenue	Closed opportunity line revenue averaged over number of revenue lines.	Closed Opportunity Line Revenue / # of Closed Opportunity Revenue Lines
Closed Opportunity Line Non-Revenue Credits	Total opportunity line revenue which are closed-won but not contributing to a sales person's quota.	
Closed Opportunity Line Non-Revenue Credits QTD	Quarter –to-date total opportunity line revenue which are closed-won but not contributing to a sales person's quota.	
Closed Opportunity Line Non-Revenue Credits YTD	Year –to-date total opportunity line revenue which are closed-won but not contributing to a sales person's quota.	
Closed Opportunity Line Revenue	Total opportunity line revenue which are closed-won. Only quota contributing revenue considered.	
Closed Opportunity Line Revenue - Period	Quarter –to-date total opportunity line revenue for the fiscal period which are closed-won but not contributing to a sales person's quota.	
Closed Opportunity Line Revenue - Year	Quarter –to-date total opportunity line revenue for the calendar year which are closed-won but not contributing to a sales person's quota.	
Closed Opportunity Line Revenue QTD	Quarter –to-date total opportunity line revenue which are closed-won. Only quota contributing revenue considered.	

Closed Opportunity Line Revenue YTD	Year –to-date total opportunity line revenue which are closed-won. Only quota contributing revenue considered.	
Expected Opportunity Line Revenue	Expected revenue at the opportunity line level. Only quota contributing revenue considered.	Source calculation: Expected Revenue = Opportunity Revenue * Win Probability
No sale Opportunity Line Revenue	Total opportunity line revenue with a ‘No Sale’ status category. Only quota contributing revenue considered.	
Open Competitive Opportunity Line Revenue	Total opportunity line revenue with an ‘Open’ status category and at least one competitor. Only quota contributing revenue considered.	
Open Opportunity Line Non-Revenue Credits	Total Revenue of opportunities with an ‘Open’ status category but not contributing to a sales person’s quota.	
Open Opportunity Line Revenue	Total opportunity line revenue with an ‘Open’ status category. Only quota contributing revenue considered.	
Opportunity Line Revenue	Total revenue at the opportunity line level. Only quota contributing revenue considered.	

Fact Name	Description	Special Considerations
Pipeline Facts	This folder contains revenue measures at the opportunity header level.	Metrics from this folder are at the opportunity ‘header’ level. They should be used with the following dimensions: Time, Secondary Dates, Customer, Contact, Customer Contact Profile, Industry, Employee, Opportunity, Territory, Revenue, Auxiliary Classification 1, Auxiliary Classification 2, Auxiliary Classification 3, Customer Organization Type, Currency, Sales Geography Zone and all Extensions of base dimensions listed above as applicable.

Metric/Measure	Description/Meaning	Calculation – where applicable
# of Closed Opportunities	Number of Closed-Won Opportunities.	
# of Customers	Number of opportunities that are closed-won.	
# of Days to Close	Number of days till expected close date for an open opportunity.	Difference between current date and expected close date
# of Lost Opportunities	Number of opportunities lost to competition.	
# of New Opportunities	Number of opportunities created in the last 90 days.	Count of opportunities where creation date > (Current date - 90)
# of Open Opportunities	Number of opportunities with an ‘Open’ status category.	
# of Opportunities	Number of all opportunities irrespective of status.	
# of Referenced Opportunities	Number of opportunities with at least one reference.	
# of Won Referenced Opportunities	Number of won opportunities with at least one reference.	
All Resource Average Deal Size	Average Deal Size for closed opportunities across all sales resources. Used for comparison between a single employee or specific set of employees and all others.	
Average Opportunity	Average opportunity revenue for closed-won	"Closed Opportunity Revenue" / "# of

Deal Size	opportunities.	Closed Opportunities"
Close Rate	Number of won opportunities expressed a percentage of the total number of opportunities.	
Closed Opportunity Revenue	Total revenue of opportunities which are closed-won.	
Days Stalled	Number of days that an opportunity has been residing in the current sales stage. Applicable to open opportunities.	
Expected Opportunity Revenue	Expected revenue at the opportunity header level. Only quota contributing revenue considered.	
Leads to Opportunity Conversion (%)	Number of leads converted to opportunities as a percentage of the total number of leads.	100 * # of Leads Converted / # of Leads
No sale Opportunity Revenue	Total Revenue of opportunities with a 'No Sale' status category. Only quota contributing revenue considered.	
Open Opportunity Revenue	Total Revenue of opportunities with an 'Open' status category.	
Opportunity Revenue	Total revenue at the opportunity header level. Only quota contributing revenue considered.	

Fact Name	Description	Special Considerations
Resource Quota Facts	Holds measures related to a sales resource quota. Quota may be revenue or non-revenue related	Resource quota facts/measures may be used with any of the following available dimensions while building reports: Time (Quota Publish Date) , Employee, Employee Org, Territory Quota, Goal, Quota Plan

Metric/Measure	Description/Meaning	Calculation – where applicable
Average Resource Quota	This is the resource quota (RQ) averaged over specific chosen dimension(s). As an example, if an ad-hoc report has Average Resource Quota by Enterprise Year by Employee, then the Average Resource Quota = Resource Quota/# of Resource Quotas within Enterprise Year for each Employee.	Total RQ / # of RQs within the dimension(s)
Resource Quota	Quota associated with a territory resource. Quota is not assigned directly to a resource in Fusion Sales. Rather it is for the territory.	
Resource Quota QTD	The cumulative resource quota, from beginning of quarter till current period.	
Resource Quota YTD	The cumulative resource quota, from beginning of year till current period.	

Fact Name	Description	Special Considerations
Sales Cycle Facts	Folder containing measures related to opportunity velocity and sales cycle duration	Metrics from this folder are at the opportunity 'header' level. They should be used with the following dimensions: Time, Secondary Dates, Customer, Contact, Customer Contact Profile, Industry, Employee, Opportunity, Territory, Revenue, Auxiliary Classification 1, Auxiliary Classification 2, Auxiliary Classification 3, Customer Organization Type, Currency, Sales

	Geography Zone and all Extensions of base dimensions listed above as applicable.
--	--

Metric/Measure	Description/Meaning	Calculation – where applicable
# Days in Stage	Number of days an opportunity is resident in a particular sales stage.	
# of Stalled Opportunities	Number of open opportunities in any stage which have exceeded the max number of days applicable for that particular stage.	
All Resource Average Sales Cycle	Average Sales Cycle across all sales resources. Used for comparison between a single employee or specific set of employees and all others.	
Average Days at Stage	Average number of days that an opportunity resides in any particular sales stage.	SUM Days at Stage /# of Opportunities
Average Deal Size	Average opportunity revenue for closed-won opportunities.	Closed Opportunity Revenue/ # of Closed Opportunities
Average Sales Cycle	Average sales cycle of closed-won opportunities. Sales Cycle is the duration in number of days between opportunity creation date and the date it was closed-won.	SUM(Sales Cycle of closed opportunities)/ # of Closed Opportunities
Average Sales Cycle of Revenue Lines	Average sales cycle of closed-won opportunity revenue lines.	SUM(Sales Cycle of Opportunity Revenue Lines)/ # of Closed Opportunity Revenue Lines
Max Days in Stage	The maximum duration (as displayed in the transaction system) that an opportunity is expected to be in a particular stage before it is considered stalled.	
Opportunity Average Days Open	Average number of days since opportunity was created, for open opportunities.	SUM (Days Open)/# of Open Opportunities
Total Sales Cycle of Opportunities	Difference between the actual close date and created date for closed opportunities.	
Total Sales Cycle of Opportunity Revenue Lines	Difference between the actual close date and created date for closed opportunity revenue lines.	

Fact Name	Description	Special Considerations
Territory Quota Facts		

Metric/Measure	Description/Meaning	Calculation – where applicable
Average Territory Quota	This is the resource quota (RQ) averaged over specific chosen dimension(s). As an example, if an ad-hoc report has Average Resource Quota by Enterprise Year by Employee, then the Average Resource Quota = Resource Quota/# of Resource Quotas within Enterprise Year for each Employee.	
Territory Adjusted Quota	Sum of territory quota and the adjustment value. The adjusted territory quota will be used to allocate quota to the child territories.	
Territory Quota	Quota associated with a territory. Quota is assigned to territory (not resource) in Fusion	

	Sales.	
Territory Quota QTD	The cumulative territory quota, from beginning of quarter till current period.	
Territory Quota YTD	The cumulative territory quota, from beginning of year till current period.	

Fact Name	Description	Special Considerations
Win Loss Facts	Folder containing metrics related to opportunity win/loss.	This folder contains win loss metrics at the opportunity header level as well as the revenue line level. Header level metrics should be used with the following dimensions: Time, Secondary Dates, Customer, Contact, Customer Contact Profile, Industry, Employee, Opportunity, Territory, Revenue, Auxiliary Classification 1, Auxiliary Classification 2, Auxiliary Classification 3, Customer Organization Type, Currency, Sales Geography Zone and all Extensions of base dimensions listed above as applicable. Line level metrics can be used with any of the above dimensions plus product.

Metric/Measure	Description/Meaning	Calculation – where applicable
# of Competitive Opportunities	Number of all opportunities with at least one competitor.	
# of Competitive Won/Lost Opportunities	Number of all won and lost opportunities which have at least one competitor.	
# of Competitors	Total number of distinct competitors who are associated with at least one revenue line.	
# of Lost Competitive Opportunities	Number of all lost opportunities which have at least one competitor.	
# of Lost Competitive Opportunity Revenue Lines	Number of lost opportunity revenue lines which had at least one competitor. Only quota contributing revenue considered.	
# of Lost Opportunity Revenue Lines	Number of lost opportunity revenue lines. Only quota contributing revenue considered.	
# of Won Competitive Opportunities	Number of all won opportunities which have at least one competitor.	
# of Won Competitive Opportunity Revenue Lines	Number of won opportunity revenue lines. Only quota contributing revenue considered.	
# of Won Opportunity Revenue Lines	Number of won opportunity revenue lines. Only quota contributing revenue considered.	
# of Won/Lost Opportunities	Number of won or lost opportunities which have at least one competitor. Only quota contributing revenue considered.	
# of Won/Lost Opportunity Revenue Lines	Number of won or lost opportunity revenue lines which have at least one competitor. Only quota contributing revenue considered.	
All Resource Win Rate	Win Rate across all sales resources. Used for comparison between a single employee or specific set of employees and all others.	
Closed Competitive Opportunity Line Revenue	Total opportunity line revenue which are closed-won and have at least one competitor associated with the revenue line. Only quota	

	contributing revenue considered.	
Closed Competitive Opportunity Revenue	Total closed-won opportunity header revenue with at least one competitor associated with the opportunity. Only quota contributing revenue considered.	
Competitive Opportunity Line Revenue	Total closed-won opportunity line revenue with at least one competitor associated with the opportunity revenue line. Only quota contributing revenue considered.	
Competitive Opportunity Revenue	Total opportunity header revenue with at least one competitor associated with the opportunity revenue line. Only quota contributing revenue considered.	
Competitor Win Rate of Opportunities	Win rate of opportunities where there is at least one primary competitor.	$100 * \# \text{ of Won Competitive Opportunities} / \# \text{ of Competitive Opportunities}$
Competitor Win Rate of Opportunity Lines	Win rate of opportunity revenue lines where there is at least one primary competitor.	$100 * \# \text{ of Won Competitive Opportunity Revenue Lines} / \# \text{ of Competitive Opportunity Revenue Lines}$
Lost Competitive Opportunity Line Revenue	Total opportunity line revenue which are lost and have at least one competitor associated with the revenue line. Only quota contributing revenue considered.	
Lost Competitive Opportunity Revenue	Total lost opportunity header revenue with at least one competitor associated with the opportunity revenue line. Only quota contributing revenue considered.	
Lost Opportunity Line Revenue	Total opportunity line revenue which are lost. Only quota contributing revenue considered.	
Lost Opportunity Revenue	Total lost opportunity header revenue. Only quota contributing revenue considered.	
Opportunity Win Probability	Win probability of the opportunity expressed as a percentage.	
Reference Win Rate	Win rate of opportunities that have at least one revenue line associated with a reference	$100 * \# \text{ of Won Referenced Opportunities} / \# \text{ of Referenced Opportunities}$
Win Rate	Number of closed-won opportunities as a percentage of closed-won and lost opportunities.	$100 * \# \text{ of Closed (that is, Won) Opportunities} / \# \text{ of Won/Lost Opportunities}$
Win Rate of Revenue Lines	Number of closed-won opportunity revenue lines as a percentage of closed-won and lost opportunity revenue lines.	$100 * \# \text{ of Closed (that is, Won) Opportunity Revenue Lines} / \# \text{ of Won/Lost Opportunity Revenue Lines}$

Copyright © 2014, Oracle and/or its affiliates. All rights reserved.

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited. The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs, including any operating system, integrated software, any programs installed on the

hardware, and/or documentation, delivered to U.S. Government end users are "commercial computer software" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, shall be subject to license terms and license restrictions applicable to the programs. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate failsafe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Xeon are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Opteron, the AMD logo, and the AMD Opteron logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information on content, products, and services from third parties.

Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services. This documentation is in pre-production status and is intended for demonstration and preliminary use only. It may not be specific to the hardware on which you are using the software. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to this documentation and will not be responsible for any loss, costs, or damages incurred due to the use of this documentation.

The information contained in this document is for informational sharing purposes only and should be considered in your capacity as a customer advisory board member or pursuant to your beta trial agreement only. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions. The development, release, and timing of any features or functionality described in this document remains at the sole discretion of Oracle.

This document in any form, software or printed matter, contains proprietary information that is the exclusive property of Oracle. Your access to and use of this confidential material is subject to the terms and conditions of your Oracle Software License and Service Agreement, which has been executed and with which you agree to comply. This document and information contained herein may not be disclosed, copied, reproduced, or distributed to anyone outside Oracle without prior written consent of Oracle. This document is not part of your license agreement nor can it be incorporated into any contractual agreement with Oracle or its subsidiaries or affiliates.