Oracle® Fusion Transactional Business Intelligence 11.1.1.9.0

Sales - CRM Forecasting Subject Area

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Contents

Sales - CRM Forecasting

Description

The Sales – CRM Forecasting subject area enables you to analyze forecast revenues at both aggregate (such as for a forecast period or year) and detail levels (such as every submitted forecast or opportunity). With the analyses that are created using this subject area, users can evaluate forecast trends within a forecast period or across periods and compare forecast to open revenues or quotas. Senior sales management can obtain a realistic comparison of forecasts to target revenues and pipeline using insights gained from best and worst case forecast figures. Sales managers can get clear visibility to forecast revenue item adjustments made, to help them fine tune submitted forecasts to yield realistic figures.

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

- What are my forecast and closed revenues for the quarter? How do they compare against my quota?
- Are revenues getting closed in line with their forecast figures? To what extent do they deviate?
- Does the forecast versus pipeline trend show a healthy picture?
- How to forecasts trend across periods? Within the same period?
- Do my forecasts rely on revenues from a few customers? What is the dependency profile?
- What were my forecast revenues for the same period, last year? How did it compare with closed revenues?
- What is the relative mix of forecast revenues by the various sales channels in a specific territory?

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 9

Dimensions

Dimension Folder Name	Description	Special Considerations	Fusion Navigation
Business Unit	Attributes of the BU such as Name, Status, Default Currency, etc.		FSM->All Tasks->Define Business Units->Manage Business Unit->(Goto Task)
Currency	Used to prefix amounts with the user's required currency for reporting.		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
Employee	Employee, often the sales resource.		Navigator->Customization->Application Composer->Standard Objects->Resource->Fields->Standard
Forecast Item	An opportunity revenue line item, when included as part of a sales forecast results in a Forecast Item. This folder has attributes for the Forecast items such as Status and Effective Date.		Navigate->Sales Forecasts->[Select Forecast Name]->Forecast Items section
Industry	Attributes of the Industry to which the customer belongs.		Navigator->Customers->[Select the customer]->Industry Section
Opportunity	Holds attributes of a sales opportunity.		Navigator->Customization->Application Composer->Standard Objects->Opportunity->Fields->Standard
Product	Holds all attributes for a product including the product hierarchy.		Navigator->Customization->Application Composer->Standard Objects->Product Group->Fields->Standard
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 Forecast	A forecast submission for a specific forecast period. This folder has the key attributes for a Sales Forecast such as Forecast period Start		Navigate->Sales Forecasts->[Select Forecast Name]

	and End dates, Forecast name and Due Date.		
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	Contains all key attributes for the canonical date (driving date) for the subject area. In this case the driving date is the Expected Close Date for the Revenue/Forecast item.	Care should be taken when using Date, because it is applicable at the item level. For example, combining summary metrics with Date would result in error. Forecast Period is the Enterprise Period – this usually aligns with the Fiscal Period. Note that both Quota and Forecast are analyzed by Enterprise period, providing a common context.	N/A
Time > Time – Additional Attributes	Contains additional attributes of Canonical/Driving Date.		N/A

Facts

Fact Name	Description	Special Considerations
Revenue Forecast Facts	Folder that has all forecast revenue metrics at summary forecast and item levels. Unadjusted measures, adjustment values and resulting adjusted forecast revenues are all available to perform best/worst case analysis/ reporting.	Building forecast reports assumes deep functional expertise in forecasting. Concepts with regard to item and summary forecasts and corresponding adjustments and the like are a must to build accurate, meaningful reports. Information provided as part of this document alone is not sufficient. However, the following dimensions can be used with revenue forecast facts. Note that certain metric-attribute combinations may not be valid as they don't make functional sense. For example, Summary forecast facts do not make sense when used with Product Name, but Item Adjustments do. **Time (Forecast Period), Territory, Product, Industry, Sales Resource, Customer, Opportunity, Forecast Item, Sales Forecast, Sales Channel**

Metric/Measure	Description/Meaning	Calculation – where applicable
Adjusted Best Case Forecast	Optimistic/Upside estimate of Adjusted Forecast.	
Adjusted Forecast	Resulting forecast revenue after applying adjustments to an unadjusted forecast. Both item and summary adjustments considered.	Unadjusted Forecast + Forecast Adjustment. (Forecast Adjustment = Item Adjustment + Summary Adjustment)
Adjusted Worst Case Forecast	Pessimistic/Downside estimate of adjusted forecast.	
Best Case Forecast Adjustment	Optimistic/Upside estimate of Forecast Adjustment.	
Best Case Item Adjustment	Optimistic estimate of Upward or downward adjustment applied to an individual forecast item.	
Best Case Summary Adjustment	Optimistic estimate of Upward or downward adjustment applied at the summary forecast level.	
Expected Forecast	Expected revenue from forecast items in a forecast period. It is equal to the item revenue times the revenue probability.	
Forecast Adjustment	Upward or downward adjustment in revenue applied to a submitted forecast. Includes both item and summary adjustments. Summary adjustments may be performed on product, territory and time.	Item Adjustment + Summary Adjustment
Forecasted Open	Item adjusted forecast after excluding forecast items that are closed.	Item Adjusted Forecast - Closed Item Revenue
Item Adjusted Best Case Forecast	Optimistic estimate of Forecast revenue after applying upward or downward adjustment on an individual forecast item, i.e. after applying item adjustment.	
Item Adjusted Forecast	Forecast revenue after applying upward or downward adjustment on an individual forecast item, i.e. after applying item adjustment. Lower levels of the hierarchy cannot view adjustments at higher tiers of the hierarchy and higher tiers	Unadjusted Forecast + Item Adjustment

	view the adjusted revenue from lower tiers as roll-up revenue in their tier of the hierarchy.	
Item Adjusted Worst Case Forecast	Pessimistic estimate of Forecast revenue after applying upward or downward adjustment on an individual forecast item, i.e. after applying item adjustment.	
Item Adjustment	Upward or downward adjustment applied to an individual forecast item.	
Latest Adjusted Best Case Forecast	Optimistic/upside estimate of adjusted forecast, as it pertains to the latest forecast submitted during a particular forecast period.	
Latest Adjusted Forecast	Adjusted forecast, as it pertains to the latest forecast during a particular forecast period.	
Latest Adjusted Worst Case Forecast	Pessimistic/Downside estimate of adjusted forecast, as it pertains to the latest forecast submitted during a particular forecast period.	
Latest Best Case Forecast Adjustment	Optimistic estimate of upward or downward adjustment in revenue applied to the latest submitted forecast. Includes both item and summary adjustments. Summary adjustments may be performed on product, territory and time.	
Latest Best Case Item Adjustment	Optimistic Estimate of upward or downward adjustment applied to an individual forecast item that is part of the latest submitted forecast.	
Latest Best Case Summary Adjustment	Optimistic estimate of upward or downward adjustment applied at the summary forecast level for the latest submitted forecast.	
Latest Expected Forecast	Expected revenue from forecast items in a forecast period associated with the latest forecast for that period. It is equal to the item revenue multiplied by the revenue probability.	
Latest Forecast Adjustment	Forecast adjustment as it pertains to the latest submitted forecast.	
Latest Forecasted Open	Item adjusted forecast excluding forecast items that are closed, as it pertains to the latest submitted forecast.	
Latest Item Adjusted Best Case Forecast	Optimistic estimate of forecast revenue prior to applying any adjustments, as it pertains to the latest submitted forecast.	
Latest Item Adjusted Forecast	Item Adjusted Forecast as it pertains to the latest forecast submitted during a particular forecast period.	
Latest Item Adjusted Worst Case Forecast	Pessimistic estimate of Item Adjusted Forecast as it pertains to the latest submitted forecast.	
Latest Item Adjustment	Upward or downward adjustment applied to an individual forecast item that is part of the latest submitted forecast.	
Latest Summary Adjustment	Upward or downward adjustment applied at the summary forecast level for the latest submitted forecast.	
Latest Unadjusted Best Case Forecast	Optimistic estimate of forecast revenue prior to applying any adjustments for the latest submitted forecast.	
Latest Unadjusted Forecast	Forecast revenue prior to applying any adjustments, for the latest submitted forecast.	
Latest Unadjusted Worst Case Forecast	Pessimistic estimate of forecast revenue prior to applying any adjustments, as it pertains to the	

	latest forecast submitted during a particular forecast period.	
Latest Won - Forecasted	Won - Forecasted as it pertains to the latest forecast submitted during a particular forecast period.	
Latest Worst Case Forecast Adjustment	Pessimistic estimate of upward or downward adjustment in revenue applied to the latest submitted forecast. Includes both item and summary adjustments. Summary adjustments may be performed on product, territory and time.	
Latest Worst Case Item Adjustment	Pessimistic estimate of upward or downward adjustment applied to an individual forecast item that is part of the latest submitted forecast.	
Latest Worst Case Summary Adjustment	Pessimistic estimate of upward or downward adjustment applied at the summary forecast level for the latest submitted forecast.	
Quantity	The product quantity in a revenue/forecast item.	
Summary Adjustment	Upward or downward adjustment applied at the summary forecast level	
Unadjusted Best Case Forecast	Optimistic estimate of forecast revenue prior to applying any adjustments.	
Unadjusted Forecast	Forecast revenue prior to applying any adjustments by the sales rep.	
Unadjusted Worst Case Forecast	Pessimistic estimate of forecast revenue prior to applying adjustments.	
Win Probability	Revenue Win probability for the revenue item.	
Won - Forecasted	Sum of closed revenue line amounts that were forecasted during a period.	Closed Item Revenue
Worst Case Forecast Adjustment	Pessimistic estimate of upward or downward adjustment in revenue applied to a submitted forecast. Includes both item and summary adjustments. Summary adjustments may be performed on product, territory and time.	
Worst Case Item Adjustment	Pessimistic Estimate of upward or downward adjustment applied to an individual forecast item.	
Worst Case Summary Adjustment	Pessimistic estimate of upward or downward adjustment applied at the summary forecast level.	

Fact Name	Description	Special Considerations
Territory Quota Facts	Holds measures related to a sales territory quota. Quota may be revenue or non-revenue related.	Territory 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 Territory Quota	This is the resource quota (RQ) averaged over specific chosen dimension(s). As an example, say 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 is 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.	

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