# Oracle® Fusion Transactional Business Intelligence 11.1.1.9.0

Sales - CRM Pipeline Subject Area

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### **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
- Channel Administrator
- Channel Sales Manager
- Channel Account Manager

### 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
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel 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)
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,		Navigate->Customers->Manage Contacts->[Select a contact]->Edit
	Phone and other key information.		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
	custome.		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

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Employee > Employee Organization	The internal org to which the employee	Same as above
Organization	. ,	
Frankrian & Calas Bassinas	belongs.	Compa on above
Employee > Sales Resource	The reporting hierarchy	Same as above
Hierarchy	in a sales org. Used to	
	report on rolled up	
11: 1 : 10 1 : 0:	metrics.	N : 1 : 0 : 1 : 1 : 1 : 1 : 1
Historical Sales Stage	Attributes related to an	Navigate->Opportunities->[Select an
	opportunity's sales	Opportunity]->[The sales method/stage field]
	stage, such as name,	Catura and Maintenance > [Capuals for
	phase, method, sales	Setup and Maintenance->[Search for
	stage order.	"Manage Sales Methods and Sales Stages"]- >Go to Task->[Select Standard Sales Process]-
		>Edit
Lie al continue	Attributes of the	
Industry		Navigator->Customers->[Select the
	Industry to which the	customer]->Industry Section
l d	customer belongs.	No destant Contamination & Application
Lead	Holds attributes of a	Navigator->Customization->Application
	sales lead.	Composer->Standard Objects->Sales Lead-
NA 1 11 C		>Fields->Standard
Marketing Source	Attributes related to	
	marketing campaign	
	such as Campaign	
	Name, Region, and	
Opportunity	Status.  Holds attributes of a	Navigator > Customization > Application
Opportunity		Navigator->Customization->Application
	sales lead.	Composer->Standard Objects->Opportunity- >Fields->Standard
Partner	Attributes related to	Navigate->Partners->[Select a Partner]->Edit
Partner		Navigate->Partifers->[Select a Partifer]->Edit
	the partner	Novigator > Customization > Application
	organization such as Partner Name, Status,	Navigator->Customization->Application Composer->Standard Objects->Partner-
	and Level.	>Fields->Standard
	and Level.	>rielus->standard
		Navigator->Customization->Application
		Composer->Standard Objects->Partner-
		>Fields->Custom
Product	Holds all attributes for a	Navigator->Customization->Application
1 Toddet	product including the	Composer->Standard Objects->Product
	product hierarchy.	Group->Fields->Standard
Reference	Attributes related to	Navigate->Customers->Manage References
	Customer Reference,	
	such as Name, Rank,	
	and Status.	
Revenue	Holds all descriptive	Navigator->Customization->Application
	attributes for a	Composer->Standard Objects->Opportunity
	Revenue line, often	Revenue->Fields->Standard
	used with line level	
	metrics.	Navigate->Opportunities->[Select an
		Opportunity]->Revenue Item section
Sales Channel	Attributes related to	N/A
	the selling channel –	
	which may be Direct	
	(Field Sales/Telesales)	
	or Indirect/Partner	
	(VAD, VAR, Reseller and	
	others).	
	others).	

	T = .	T	Takaa
	Sales goals, which are		Sales Goal
	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.		21/2
Secondary Dates	Folder for the less		N/A
	commonly used dates		
	in reporting.		
Secondary Dates > Secondary	Folder for the less		N/A
Dates – Additional Attributes	commonly used		
	attributes amongst		
	secondary dates.		
Territory	Holds all key attributes		Navigator->Customization->Application
,	of the sales territory		Composer->Standard Objects->Forecast
	dimension.		Territory Details->Fields->Standard
Tauritau I Tauritau	Holds all hierarchical		Same as above
Territory > Territory			Same as above
Hierarchy	attributes of a sales		
	territory.		
Time	Contains all key		N/A
	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:		
	Pipeline facts –		
	Expected Close Date of		
	Opportunity.		
	Pipeline Detail facts –		
	Expected Close Date of		
	Revenue Line.		
	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.		
	Leads facts – Lead		
	Creation Date.		
	Activity facts – Activity		
	C1 1 D 1		
	Start Date.		
Time > Time – Additional Attributes	Start Date.  Contains additional attributes of		N/A

	1
Canonical/Driving Date.	
Carlottical Ditving Date.	

### **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.	The metrics in this folder should be used with the following dimensions: Activity, Business Unit, Time (Activity Start Date: Due date for Task, Start Date for Appt), Lead, Opportunity, Marketing Source Customer, Customer Contact, Industry, Employee, Currency, Sales Geography Zone and all Extension/Custom Attributes of base dimensions listed above as applicable.
		Several metrics can be derived at the report level with the generic '# of Activities' metric as the basis and by using attributes related to Activity status, End Date, etc. For Example, # of Open/Closed Activities; # of Opportunities/ Customers with Activities, Average # of activities per employee, etc.

Metric/Measure	Description/Meaning	Calculation – where
		applicable
# of Activities	Count of all customer activities of all Activity Function Types - Tasks,	
	Appointments and Call Reports	
Activity	The duration of the activity. Please the unit of measure depends on the	
Duration	default set in the source system.	

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 / #	Number of converted leads expressed as a	100 * # of Converted Leads /# of
Qualified (%)	percentage of the number of qualified leads.	Qualified Leads
# Highly-Rank	Number of highly ranked qualified leads	100 * # of Highly Qualified Leads /# of
Qualified/# Qualified	expressed as a percentage of the number of	Qualified Leads
(%)	qualified leads.	
# Highly-Ranked	Number of highly ranked qualified leads.	# of Qualified Leads where Rank is 'Hot'
Qualified Leads		
# Low-Ranked	Number of low ranked qualified leads.	# of Qualified Leads where Rank is
Qualified Leads		'Cool'
# Medium-Rank	Number of medium ranked qualified leads	100 * # of Medium Qualified Leads /#
Qualified/# Qualified	expressed as a percentage of the number of	of Qualified Leads
(%)	qualified leads.	
# Medium-Ranked	Number of medium ranked qualified leads.	# of Qualified Leads where Lead Rank is

Qualified Leads		'WARM'
# of Accepted Leads	Number of leads accepted by the assignee.	# of Leads when Accepted Flag is 'Y'
# of Assigned Leads		# of Leads when Assignment Status is
# Of Assigned Leads	Number of leads assigned to a sales group or	9
" (B3D C )	sales representative.  Number of leads associated with business to	'Assigned'
# of B2B Customer		# of Customer with Leads where Party
with Leads	business customers.	Type is 'ORGANIZATION'
# of B2C Customer	Number of leads associated with business to	# of Customer with Leads where Party
with Leads	consumer customers.	Type is 'PERSON'
# of Contacts with	Number of customer contacts that have at least	# of Primary Contacts that are
Leads	one lead associated with them.	associated with Leads
# of Customer Leads	Number of leads already associated with	# of Leads from Customer where Status
Converted	customers that have been converted to an	is 'Converted'
	opportunity.	
# of Customer with	Number of customers who have at least one	# of Customers that are associated with
Leads	lead associated with them.	Leads
# of Lead Interactions	Number of customer interactions associated	# of Interactions that are associated
	with a lead.	with Leads
# of Leads Converted	Number of leads converted to opportunities.	# of Leads where Status is 'Converted'
# of Leads from B2B	Number of leads generated from business to	# of Leads from Customer where Party
Customer	business customers.	Type is 'ORGANIZATION'
# of Leads from B2C	Number of leads generated from business to	# of Leads from Customer where Party
Customer	consumer customers.	Type is 'PERSON'
# of Leads from	Number of leads generated from marketing	# of Leads generated from marketing
Campaign	campaigns.	campaigns
# of Leads from	Number of leads created from existing	# of Leads for Customer
Customer	customers.	
# of Leads from	Number of leads created from prospects.	# of Leads for Prospect
Prospect		
# of Leads Generated	Number of leads generated from marketing	# of Leads generated by any marketing
from Marketing	source – could be a marketing campaign.	activities
Source		
# of Leads Generated	Leads generated from sources other than a	# of Leads not generated by any
from Non Marketing	marketing source.	marketing activities
Source		
# of Leads	Total number of leads.	# of Leads created
# of Open Leads	Number of leads that are 'Open', that is, not	# of Leads where Status is 'Unqualified'
	acted upon.	
# of Prospect Leads	Number of leads generated from prospects and	# of Leads from Prospect where Status
Converted	converted to opportunities.	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	# of Leads where Status is 'Unqualified'
	sales persons.	and Accepted Flag is 'N'
# of Unassigned Leads	Leads not assigned to any sales person to act	# of Leads - # of Assigned Leads
o. oassigned Leads	upon.	1. 10000 or roomand teads
# of Unconverted	Number of leads which were not converted.	# of Leads - # of Leads Converted
Leads	Trainiber of reads which were not converted.	" or Leads " or Leads Converted
# of Unqualified Leads	Number of leads that is yet to be qualified.	# of Leads where Status is 'Unqualified'
# Qualified / #	Ratio between qualified leads and unqualified	100 * # of Qualified Leads / # of
· ·		
Unqualified (%)	leads.	Unqualified Leads
# Qualified Leads not	Total number of qualified leads that are not	
Followed up before	followed up before their expiry.	
Expiration	N. I. C. II. II.	400 * "
# Retired / #	Number of retired leads expressed as a	100 * # of Retired Leads /# of
Unqualified (%)	percentage of the number of unqualified leads.	Unqualified Leads

All December Leads to	Londonous who disconnects units a no	
All Resource Leads to	Leads converted to opportunity, in %	
Opportunity	(Irrespective of resource hierarchy level).	
Conversion (%)		
Average # of Days	Average number of days that unqualified leads	Average number of days from lead
Open for Unqualified	are open.	creation date to current date (report
Leads		date) for unqualified leads
Average # of Days to	Average number of days took to assign the	Average number of days from lead
Assign Leads	leads.	creation date to owner assigned date
		for assigned leads
Average # of Days to	Average number of days it took to covert the	Average number of days from lead
Convert Leads	leads to opportunity.	creation date to owner assigned date
		for converted leads
Avg Lead Age (Days)	Average # of Days before the lead is converted/	For resolved leads (lead status is
0 0-(	rejected / retired. # of days lead is open until	'Converted' or 'Retired'), this means
	having a final outcome.	that average number of days from lead
		creation date to the date on which lead
		is resolved (Converted or Retired).
		is resolved (converted of nethed).
		For other leads, this means that
		average number of days from lead
		creation date to current date (report
		date).
Estimated Revenue	This matric is for internal use only	uatej.
	This metric is for internal use only.	
(Internal)	Decrees a stimulated by Color Decidiation Francis	Land there Are an a Develope Are a continue
Estimated Revenue	Revenue estimated by Sales Prediction Engine	Lead Item Average Revenue Amount for
	(SPE). Applicable for leads generated by SPE.	Leads that are generated by Sales
		Prediction Engine
Lead Qualification	Number of leads qualified expressed as a	100 * # of Qualified Leads /# of Leads
Rate (%)	percentage of the total number of leads created.	
Leads to Opportunity	Number of leads converted to opportunities	100 * # of Converted Leads /# of Leads
Conversion (%)	expressed as a percentage of the total number	
	of leads created.	
Potential Revenue	This is the deal size entered on the transaction	Lead Deal Size
	area of the screen for the lead.	
Rejected Leads (%)	Number of leads rejected expressed as a	100 * # of Rejected Leads /# of Leads
, ,	percentage of the total number of leads created.	
Retired Leads (%)	Number of leads retired expressed as a	100 * # of Retired Leads /# of Leads
	percentage of the total number of leads created.	1
Total Market Potential	Total expected revenue from all open leads.	Total Lead Deal Size from Leads where
Total Market Fotelitia	Total expected revenue from an open leads.	Status is 'Qualified' or 'Unqualified'
		Status is Qualified of Oriqualified

Fact Name	Description	Special Considerations
Pipeline Detail	This folder contains revenue measures at the	Metrics from this folder are at the 'detail' level. They
Facts	opportunity line/revenue level.	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	Number of opportunity revenue lines which are	
Opportunity Revenue	closed-won. Only quota contributing revenue	

Lines	considered.	
# of Competitive	Number of opportunity revenue lines which	
Opportunity Revenue	have at least one competitor. Only quota	
Lines	contributing revenue considered.	
# of Open Opportunity	Number of opportunity revenue lines which are	
Revenue Lines	in the 'open' status category. Only quota	
	contributing revenue considered.	
# of Opportunities		
with Revenue Lines		
# of Opportunity	Number of opportunity revenue lines of all	
Revenue Lines	statuses. Only quota contributing revenue lines	
	considered.	
# of Products	Number of Products.	
Average Closed	Closed opportunity line revenue averaged over	Closed Opportunity Line Revenue / # of
Opportunity Line	number of revenue lines.	Closed Opportunity Revenue Lines
Revenue		
Closed Opportunity	Total opportunity line revenue which are closed-	
Line Non-Revenue	won but not contributing to a sales person's	
Credits	quota.	
Closed Opportunity	Quarter –to-date total opportunity line revenue	
Line Non-Revenue	which are closed-won but not contributing to a	
Credits QTD	sales person's quota.	
Closed Opportunity	Year –to-date total opportunity line revenue	
Line Non-Revenue	which are closed-won but not contributing to a	
Credits YTD	sales person's quota.	
Closed Opportunity	Total opportunity line revenue which are closed-	
Line Revenue	won. Only quota contributing revenue	
	considered.	
Closed Opportunity	Quarter –to-date total opportunity line revenue	
Line Revenue - Period	for the fiscal period which are closed-won but	
	not contributing to a sales person's quota.	
Closed Opportunity	Quarter –to-date total opportunity line revenue	
Line Revenue - Year	for the calendar year which are closed-won but	
	not contributing to a sales person's quota.	
Closed Opportunity	Quarter –to-date total opportunity line revenue	
Line Revenue QTD	which are closed-won. Only quota contributing	
	revenue considered.	
Closed Opportunity	Year –to-date total opportunity line revenue	
Line Revenue YTD	which are closed-won. Only quota contributing	
	revenue considered.	
Expected Opportunity	Expected revenue at the opportunity line level.	Source calculation: Expected Revenue =
Line Revenue	Only quota contributing revenue considered.	Opportunity Revenue * Win Probability
No sale Opportunity	Total opportunity line revenue with a 'No Sale'	
Line Revenue	status category. Only quota contributing	
0	revenue considered.	
Open Competitive	Total opportunity line revenue with an 'Open'	
Opportunity Line	status category and at least one competitor.	
Revenue	Only quota contributing revenue considered.	
Open Opportunity	Total Revenue of opportunities with an 'Open'	
Line Non-Revenue Credits	status category but not contributing to a sales	
	person's quota.	
Open Opportunity	Total opportunity line revenue with an 'Open'	
Line Revenue	status category. Only quota contributing revenue considered.	
Opportunity Line	Total revenue at the opportunity line level. Only	
Revenue	quota contributing revenue considered.	
nevenue	quota continuuting revenue considered.	

Fact Name	Description	Special Considerations
Pipeline Facts	This folder contains revenue measures at the	Metrics from this folder are at the opportunity
	opportunity header level.	'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	Number of Closed-Won Opportunities.	
Opportunities		
# of Customers	Number of opportunities that are closed-won.	
# of Days to Close	Number of days till expected close date for an	Difference between current date and
	open opportunity.	expected close date
# of Lost	Number of opportunities lost to competition.	·
Opportunities		
# of New	Number of opportunities created in the last 90	Count of opportunities where creation
Opportunities	days.	date > (Current date - 90)
# of Open	Number of opportunities with an 'Open' status	
Opportunities	category.	
# of Opportunities	Number of all opportunities irrespective of	
	status.	
# of Referenced	Number of opportunities with at least one	
Opportunities	reference.	
# of Won Referenced	Number of won opportunities with at least one	
Opportunities	reference.	
All Resource Average	Average Deal Size for closed opportunities	
Deal Size	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	Total revenue of opportunities which are closed-	
Revenue	won.	
Days Stalled	Number of days that an opportunity has been	
	residing in the current sales stage. Applicable to	
	open opportunities.	
Expected Opportunity	Expected revenue at the opportunity header	
Revenue	level. Only quota contributing revenue	
	considered.	
Leads to Opportunity	Number of leads converted to opportunities as a	100 * # of Leads Converted / # of Leads
Conversion (%)	percentage of the total number of leads.	
No sale Opportunity	Total Revenue of opportunities with a 'No Sale'	
Revenue	status category. Only quota contributing	
	revenue considered.	
Open Opportunity	Total Revenue of opportunities with an 'Open'	
Revenue	status category.	
Opportunity Revenue	Total revenue at the opportunity header level.	
	Only quota contributing revenue considered.	

Fact Name	Description	Special Considerations
Resource	Holds measures related to a sales resource quota.	Resource quota facts/measures may be used with
Quota Facts	Quota may be revenue or non-revenue related	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	This is the resource quota (RQ) averaged over	Total RQ / # of RQs within the
Quota	specific chosen dimension(s). As an example, if	dimension(s)
	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.	
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	Folder containing measures related to opportunity	Metrics from this folder are at the opportunity
Facts	velocity and sales cycle duration	'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	Number of open opportunities in any stage	
Opportunities	which have exceeded the max number of days	
	applicable for that particular stage.	
All Resource Average	Average Sales Cycle across all sales resources.	
Sales Cycle	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	SUM Days at Stage /# of Opportunities
	resides in any particular sales stage.	
Average Deal Size	Average opportunity revenue for closed-won	Closed Opportunity Revenue/ # of
	opportunities.	Closed Opportunities
Average Sales Cycle	Average sales cycle of closed-won opportunities.	SUM( Sales Cycle of closed
	Sales Cycle is the duration in number of days	opportunities)/# of Closed
	between opportunity creation date and the date	Opportunities

	it was closed-won.	
Average Sales Cycle of Revenue Lines	Average sales cycle of closed-won opportunity revenue lines.	SUM(Sales Cycle of Opportunity Revenue Lines)/# of Closed
Revenue Lines	revenue illes.	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	Difference between the actual close date and	
Opportunity Revenue	created date for closed opportunity revenue	
Lines	lines.	

Fact Name	Description	Special Considerations
Territory	Folder containing measures related to quotas	Territory quota facts/measures may be used with any
Quota Facts	allocated to sales territories.	of the following available dimensions while building
		reports:
		Time (Quota Publish Date) , Territory Quota, Quota
		Plan

Metric/Measure	Description/Meaning	Calculation – where applicable
Average Territory	This is the resource quota (RQ) averaged over	
Quota	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	Sum of territory quota and the adjustment	
Quota	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	This folder contains win loss metrics at the
	win/loss.	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	Number of all opportunities with at least one	
Opportunities	competitor.	
# of Competitive	Number of all won and lost opportunities which	
Won/Lost	have at least one competitor.	
Opportunities	,	
# of Competitors	Total number of distinct competitors who are	
" or competitors	associated with at least one revenue line.	
# of Lost Competitive	Number of all lost opportunities which have at	
Opportunities	least one competitor.	
# of Lost Competitive	Number of lost opportunity revenue lines which	
Opportunity Revenue	had at least one competitor. Only quota	
Lines	contributing revenue considered.	
# of Lost Opportunity	Number of lost opportunity revenue lines. Only	
Revenue Lines	quota contributing revenue considered.	
# of Won Competitive	Number of all won opportunities which have at	
Opportunities	least one competitor.	
# of Won Competitive	Number of won opportunity revenue lines. Only	
Opportunity Revenue	quota contributing revenue considered.	
Lines		
# of Won Opportunity	Number of won opportunity revenue lines. Only	
Revenue Lines	quota contributing revenue considered.	
# of Won/Lost	Number of won or lost opportunities which have	
Opportunities	at least one competitor. Only quota contributing	
	revenue considered.	
# of Won/Lost	Number of won or lost opportunity revenue	
Opportunity Revenue	lines which have at least one competitor. Only	
Lines	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	Total opportunity line revenue which are closed-	
Opportunity Line	won and have at least one competitor	
Revenue	associated with the revenue line. Only quota	
	contributing revenue considered.	
Closed Competitive	Total closed-won opportunity header revenue	
Opportunity Revenue	with at least one competitor associated with the	
	opportunity. Only quota contributing revenue	
	considered.	
Competitive	Total closed-won opportunity line revenue with	
Opportunity Line	at least one competitor associated with the	
Revenue	opportunity revenue line. Only quota	
	contributing revenue considered.	
Competitive	Total opportunity header revenue with at least	
Opportunity Revenue	one competitor associated with the opportunity	
	revenue line. Only quota contributing revenue	
	considered.	
Competitor Win Rate	Win rate of opportunities where there is at least	100 * # of Won Competitive
of Opportunities	one primary competitor.	Opportunities / # of Competitive
		Opportunities
Competitor Win Rate	Win rate of opportunity revenue lines where	100 *# of Won Competitive

of Opportunity Lines	there is at least one primary competitor.	Opportunity Revenue Lines / # 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 * # of Won Referenced Opportunities /# of Referenced Opportunities
Win Rate	Number of closed-won opportunities as a percentage of closed-won and lost opportunities.	100 * # of Closed (that is, Won) Opportunities / # 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 * # of Closed (that is, Won)Opportunity Revenue Lines / # of Won/Lost Opportunity Revenue Lines

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