Oracle® Fusion Transactional Business Intelligence 11.1.1.9.0

Sales - CRM Sales Account Territory Subject Area

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Contents

Sales - CRM Sales Account Territory

Description

A Sales Account may be assigned to more than one Territory and a Territory may be assigned to more than one Sales Account. This subject area (SA) captures this ‘many to many’ relationship that exists between sales accounts and territories, which enables you to report on account-territory assignments. Both Primary and Non-primary territories are shown in these reports.
Note: The Territory dimension in other SAs with performance metrics such as revenue, activity, and so on, refers to an Account’s primary territory only. The other use of this SA is to create ‘Saved Queries’ that can be applied as filters in reports. For example, you might have ‘List of accounts in my resource team's territory’ as a saved query, which you can apply as a filter in a report to assess revenue performance.

Useful saved queries are provided for illustrative purposes in the ‘Saved Queries- OTBI’ folder in BI Presentation Catalog (Location: Shared/Sales/Subject Area Contents). If your business needs are not met by any of the available saved filters, you can use an appropriate ‘assignment’ SA such as Sales - CRM Sales Account Territory to create your own Saved Query for use in reporting.

Creation of reports involves multiple SAs and these are done via cross SA joins. If you created a report using a cross-SA join, then you must include at least one metric from each subject area, and select the ‘Enable Dimensionality’ check box in Answers. Using these SAs directly with metrics in a cross subject area join should be avoided as it might show unexpected or incorrect results due to double counting.

This subject area can be used in business scenarios such as:

- Do my sales territories need re-balancing? As a sales manager, I would like to see the list of accounts under the territories owned by my (resource) team.
- As a sales rep, I would like to see a list of Commercial Accounts in the territories that I own together with the date I last visited them, to ensure that I am adequately covering these.
- For the upcoming one-on-one with my rep, I would like to obtain the list of accounts together with open revenues for these accounts, where she is on the account territory team.
- As the VP of Sales, I need a comprehensive report on customer open/closed revenues and activities for all accounts in my resource team’s territory hierarchy.

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

- Sales Administrator
- Sales Executive
- Sales Manager
- Sales Representative

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
Account Territory	This dimension can be used to display all Territories associated with a Sales Account, including both primary and non-primary territories. Contains key attributes for reporting and filtering such as Territory Type, Territory Owner, and Territory Owner Party Id.	1. 'Territory Owner Party Id' column is equated to the session variable 'USER_PARTY_ID' to filter a report by the logged-in user's territory ownership. 2. 'Account' territory is used for sales account assignments and can be distinct from 'Forecast' or 'Lead' or 'Partner' territories.	Navigator->Customization->Application Composer->Standard Objects->Forecast Territory Details->Fields->Standard
Account Territory -> Account Hierarchy	This is the Account territory hierarchy with all levels.		Navigate->Customers->[Select a Customer]->Edit->Action->Manage Account Hierarchy
Account Territory -> Account Territory Extension	Contains placeholders for extensible attributes. Only used columns are displayed.		Navigator->Customization->Application Composer->Standard Objects->Forecast Territory Details->Fields->Custom
Customer	Contains all key attributes of a customer. Note that the terms Customer and Sales Account are used interchangeably. Although this is called 'Customer' to maintain the generalized connotation (Prospect/Sales Account, etc), typically we are dealing with a Sales Account in Sales Analytics, i.e. a 'customer' with whom we have established a selling relationship.	The 'Sales Account Director Id' column is equated to the session variable 'USER_PARTY_ID' to filter a report by logged in user's account ownership.	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 -> Customer Group Extension	Contains placeholders for extensible attributes. Only used columns are displayed.		Navigator->Customization->Application Composer->Standard Objects->Account->Fields->Custom

Customer -> Customer Organization Extension	Contains placeholders for extensible attributes. Only used columns are displayed.		Navigator->Customization->Application Composer->Standard Objects->Account->Fields->Custom
Customer -> Customer Person Extension	Contains placeholders for extensible attributes. Only used columns are displayed.		Navigator->Customization->Application Composer->Standard Objects->Account->Fields->Custom
Customer -> Sales Account Extension	Contains placeholders for extensible attributes. Only used columns are displayed.		Navigator->Customization->Application Composer->Standard Objects->Account->Fields->Custom
Sales Account Territory Role	Contains a single column, 'Sales Account Territory ID', which establishes the assignment relationship between Territory and Sales Account.	This column is typically not required in reports. You might use it to uniquely identify a relationship in the unlikely event that you have two customers and two territories with the same names, and the # of Sales Account Territory Role is not part of the query.	Navigate->Customers->[Select a Customer]->Edit->Team->Internal Territories
Sales Account Territory Role -> Sales Account Territory Role Extension	Contains placeholders for extensible attributes. Only used columns are displayed.		Navigator->Customization->Application Composer->Standard Objects->Sales Account Territory->Fields->Custom

Facts

Fact Name	Description	Special Considerations
Sales Account Territory Facts	This folder contains a metric related to Sales Account Territory. The metric is rarely displayed on reports themselves.	This metric is used to establish joins when used with other subject areas and is usually not displayed in reports, although it is part of the report criteria.

Metric/Measure	Description/Meaning	Calculation – where applicable
# of Sales Account Territory Roles	Number of sales account territory roles.	