Oracle® Fusion Transactional Business Intelligence 11.1.1.8.0

Sales - CRM Customers and Contacts Real Time Subject Area

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Contents

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Description

The focus of this subject area is the Customer (and their Contacts). Exhaustive customer, contact and contact profile information is exposed, making it possible to comprehensively report on all aspects of customers and contacts. The reportable information is not restricted to key aspects about the customer/contact, rather it extends to highly sales- relevant information such as a contact's buying role, influence level, sales affinity, etc. The subject area (unlike 'Sales – CRM Customer Overview') is not restricted to revenue or other transaction bearing customer/contacts. Reports created from this subject area return data that includes all customers – irrespective of whether they have a revenue transaction or other transaction. In addition, you can report on all associated customer contacts, not just primary contacts. The subject area covers B2B, B2C and Group type customers. The subject area also stores custom attributes via the respective extension folders.

This subject area is primarily meant to report on customer and contact information, not for transactions associated with those customer/contacts. To report on revenue transactions please use Sales – CRM Customer Overview, for Activities, the Sales – CRM Sales Activity subject area and so on.

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

- Who are all the contacts for my key customers and what are their roles?
- What are the contact-points (phone, email, address, etc) of my key contacts?
- Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region 'X'?
- Where does the customer I am selling to fit in the overall organization hierarchy of the customer's enterprise?
- What are the names of the customers that my team owns? Who are the key contacts?
- Where can I get the list of my customer CEO's so that I may submit nominations for the ensuing CEO summit being organized by my company?
- Who are my 'new' customers, that is, those created in the past 6 months?

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

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

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 CRM Navigation
Contact	Attributes of a 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
Customer	Contains all key attributes of a customer. B2B/Organization, B2C/Person and Groups customer attributes are exposed.	Due to the large number of attributes available for reporting, the 'sort' functionality can be used to ease searching of specific attributes during report creation.	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
Time	This is the Customer/Contact Creation Date (as applicable).		N/A
Time > Time – Additional Attributes	Contains additional attributes of Customer/ Contact Creation Date.		N/A

Facts

Fact Name	Description	Special Considerations
Person Facts	Holds metric(s) from the underlying 'person' fact table.	The metric(s) work with the following dimensions: Time, Customer, Contact, Customer Contact Profile and all available extensions of base dimensions. Note that there should not be a need to use any metric, as this subject area is primarily meant to report on customer and contact information, as

		already mentioned in this document.

Metric/Measure	Description/Meaning	Calculation – where applicable
# Contacts for All Accounts	Number of contacts across all customers.	
