Oracle® Fusion Transactional Business Intelligence 11.1.1.8.0

Sales - CRM Historical Pipeline Subject Area

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Contents

Sales - CRM Historical Pipeline

Description

The Historical Pipeline subject area enables you to track historical pipeline revenue numbers and opportunity transitions and report on them in the context of key business objects such as Customer/Account, Opportunity, Sales Resource, Product, and Territory. In order to use this subject area, you must have run the required “ESS jobs” in Oracle Sales Cloud so that transaction data has been snapshot and stored with your required frequency. Although this subject area is similar to the Sales – CRM Pipeline Subject Area, the Pipeline subject area is used for ‘current’ state analysis of revenues, whereas the Historical Pipeline subject area is used for analyzing historical trends in pipeline revenue. Both summary and detail historical pipeline revenue metrics are supported. Historical pipeline analysis is always with respect to ‘Pipeline Snapshot Date/Period/Quarter/Year’.

Note that Enterprise Calendar is only supported for Snapshot time. The dimension entities that are snapshot for historical analysis are Opportunity (via ‘Historical Opportunity’) and Revenue (via ‘Historical Revenue’). So, you will notice that there are both Opportunity/Historical Opportunity and Revenue/Historical Revenue. Except as just noted, all dimensions – such as Product, Territory, Sales Resource, etc represent ‘current’ state. So, any historical pipeline metrics analyzed with these, show current data for the dimensions. For example, a report showing sales resource hierarchy and ‘open opportunity line revenue’ across a range of past snapshot dates, would show historical revenue numbers against *present* hierarchy.

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

- How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?
- Are we pushing out too many deals to subsequent fiscal quarters? What are the higher value deals that have been moved out?
- What are the opportunities that have undergone revenue changes – either upward or downward? Which of my team members own these opportunities?
- How are product revenues trending month over month? Can I get a picture of product revenue evolution?
- I need to review a territory rebalancing proposal. How can I get a historical monthly trend of closed revenue by current territories?

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

Historical Opportunity	Contains Opportunity attributes as of a specific point in time-could be as of a certain date, month, quarter, etc depending on the snapshot frequency.	The difference between 'Opportunity' and 'Historical Opportunity' is that the former represents the 'current' values of the opportunity attributes whereas the latter represents these values as of a certain point in time specified by the 'Pipeline Snapshot Date'. Use this only when there is a necessity, such as tracking opportunity transitions. In most analyses, the 'Opportunity' dimension can be used with historical pipeline metrics.	Navigator->Customization->Application Composer->Standard Objects->Opportunity->Fields->Standard
Historical Revenue	Holds all descriptive attributes for a Revenue line as of a specific point in time, for example, a date, month, or quarter, etc depending on the snapshot frequency.	Revenue attributes are used with pipeline detail facts/metrics. The difference between 'Revenue' and 'Historical Revenue' is that the former represents the 'current' values of the Revenue attributes whereas the latter represents these values as of a certain point in time specified by the 'Pipeline Snapshot Date' Use this only when there is a necessity, such as tracking revenue line transitions. In most analyses the 'Revenue' dimension can be used with historical pipeline detail metrics.	Navigator->Customization->Application Composer->Standard Objects->Opportunity Revenue->Fields->Standard Navigate->Opportunities->[Select an Opportunity]->Revenue Item section
Industry	Attributes of the		Navigator->Customers->[Select the

	Industry to which the customer belongs.		customer]->Industry Section
Opportunity	Holds attributes of an opportunity.	Unlike 'Historical Opportunity' the attributes under this dimension are all current values.	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
Pipeline Snapshot Date	The 'as of' date for historical pipeline and historical pipeline detail facts.	Any historical pipeline analysis needs to be pivoted against the Pipeline Snapshot Date/Period/Quarter/ Year. This is the 'as of' date of all historical entities that are snapshot - historical pipeline, historical opportunity or historical revenue dimension. ALWAYS use Pipeline Snapshot Date during any historical analysis, otherwise the report is erroneous as all snapshots are summed, leading to double counting.	N/A
Product	Holds all attributes for a product including the product hierarchy.		Navigator->Customization->Application Composer->Standard Objects->Product Group->Fields->Standard
Revenue	Holds all descriptive attributes for a Revenue line, often used with line level metrics.	Unlike 'Historical Revenue' the attributes under this dimension are all current values.	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 Resource Hierarchy	The reporting hierarchy		Navigator->Customization->Application

	in a sales org. Used to report on rolled up metrics.		Composer->Standard Objects->Resource->Fields->Standard
Sales Stage	Attributes related to the opportunity sales stage such as name, method, etc.	The attributes under this dimension are all current values.	Navigator->Customization->Application Composer->Standard Objects->Opportunity->Fields->Standard Navigator->Customization->Application Composer->Standard Objects->Opportunity->Fields->Custom Navigate->Opportunities->[Select an Opportunity]->Edit
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	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: **Historical Pipeline facts** – Expected Close Date of Opportunity. **Historical Pipeline Detail facts** – Expected Close Date of Revenue Line.	Note the difference between Pipeline Snapshot Date and the date under 'Time'. The Pipeline Snapshot Date is the 'As of' date to report on historical revenues/opportunities. The Date under 'Time' is the expected close date of an opportunity or revenue line *within* each snapshot.	N/A
Time -> Time – Additional Attributes	Contains additional attributes of Canonical/Driving Date.		N/A

Facts

Fact Name	Description	Special Considerations
Historical Pipeline Detail Facts	This folder contains historical snapshots of revenue measures at the opportunity line level.	Metrics from this folder are at the 'detail' level. They can be used with the following dimensions: Pipeline Snapshot Date, Time, Secondary Dates, Customer, Contact, Customer Contact Profile, Industry, Employee, Employee Organization, Product, Opportunity, Historical Opportunity, Territory, Revenue, Historical Revenue, Currency, Industry, Sales Channel, Partner and all Extensions of base dimensions listed above as applicable. *Note: All metrics in this folder may not be applicable to all the dimensions mentioned above. Please use functional judgment to combine dimensions and metrics while building an analysis.*

Metric/Measure	Description/Meaning	Calculation – where applicable
# of Closed Opportunity Revenue Lines	Number of opportunity revenue lines that are closed-won. Only quota contributing revenue considered.	
# of Open Opportunity Revenue Lines	Number of opportunity revenue lines that are in the 'open' status category. Only quota contributing revenue considered.	
# of Opportunity Revenue Lines	Number of opportunity revenue lines of all statuses. Only quota contributing revenue lines considered.	
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 that are closed-won but not contributing to a sales person's quota.	
Closed Opportunity Line Revenue	Total opportunity line revenue that 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
Historical Pipeline Facts	This folder contains historical snapshots of revenue measures at the opportunity header or summary level.	Metrics from this folder are at the opportunity 'header' level. They can be used with the following dimensions: Pipeline Snapshot Date, Time, Secondary Dates, Customer, Contact, Customer Contact Profile, Industry, Employee, Employee Organization, Opportunity, Historical Opportunity, Territory, Revenue, Historical Revenue, Currency, Industry, Sales Channel, Partner and all Extensions of base dimensions listed above as applicable. *Note: All metrics in this folder may not be applicable to all the dimensions mentioned above. Please use functional judgment to combine dimensions and metrics while building an analysis.*

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.	
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 Deal Size	Average opportunity revenue for closed-won opportunities.	"Closed Opportunity Revenue" / "# of 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.	
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.	