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Sales - CRM Sales Account Resource Subject Area

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Sales - CRM Sales Account Resource

Description

The Sales – CRM Sales Account Resource subject area enables you to analyze Resources on a Sales Account and the role that each Resource plays. Unlike other subject areas, where Employee or Resource refers only to Primary Resources, the Employee dimension in this subject area refers to both Primary and Non-primary Resources.

This subject area can be combined using a cross subject area join with any other subject area that has the Customer dimension, to filter a report based on a member of the sales account team, (using either the logged-in user or subordinates of the logged-in user). When you create a report in Answers using a cross subject area join, you must include at least one metric from each subject area, and select the 'Enable Dimensionality' check box on the 'Advanced' tab.

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

- What are the sales accounts that I own?
- On which sales accounts am I a member of the account team?
- What are the sales accounts owned by my subordinates or me?
- What are the sales accounts where my subordinates or I are part of the account team?
- How is my team doing in terms of task completions? (requires cross subject area join with Sales – CRM Sales Activity)

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

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
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.	Employee dimension in this subject area refers to both Primary and Non-primary Resources, unlike other subject areas, where Employee or Resource refers to only Primary Resource.	Navigator->Customization->Application Composer->Standard Objects->Resource->Fields->Standard
Employee -> Sales Resource Hierarchy	The reporting hierarchy in a sales org. Used to report on rolled up metrics.		Same as above
Sales Account Resource Role	This is the role that a sales resource plays on the Account team. For example, Sales Rep, Executive sponsor, etc. Contains related key attributes such as whether the resource is primary on the account, function, etc.		Navigate->Customers->[Select a Customer]->Edit->Team->Team Members

Facts

Fact Name	Description	Special Considerations
Sales Account Resource Facts	This folder contains a metric related to Sales Account Resource. The metric is rarely displayed on reports themselves.	This metric is needed for the purpose of establishing joins, when used with other subject areas and is usually hidden in reports as it has little business value.

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

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