



PeopleSoft Enterprise Sales 8.9 Reports

June 2004

PeopleSoft Enterprise Sales 8.9 Reports

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About This PeopleBook

PeopleBooks provide you with the information that you need to implement and use PeopleSoft applications.

This preface discusses:

- Related documentation.
- Comments and suggestions.

Related Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on the PeopleSoft Customer Connection website. Through the Documentation section of PeopleSoft Customer Connection, you can download files to add to your PeopleBook Library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM.

Important! Before you upgrade, you must check PeopleSoft Customer Connection for updates to the upgrade instructions. PeopleSoft continually posts updates as the upgrade process is refined.

See Also

PeopleSoft Customer Connection, <https://www.peoplesoft.com/corp/en/login.jsp>

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- Web
- Telephone
- Email

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From the Documentation section of the PeopleSoft Customer Connection website, access the PeopleBooks Press website under the Ordering PeopleBooks topic. The PeopleBooks Press website is a joint venture between PeopleSoft and MMA Partners, the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

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See Also

PeopleSoft Customer Connection, <https://www.peoplesoft.com/corp/en/login.jsp>

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft Product Documentation Manager PeopleSoft, Inc. 4460 Hacienda Drive Pleasanton, CA 94588

Or send email comments to doc@peoplesoft.com.

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

CHAPTER 1

PeopleSoft Sales Reports

This chapter provides an overview of PeopleSoft Sales reports and enables you to view a summary table of all reports.

Note. For samples of these reports, see the Portable Document Format (PDF) files published on CD-ROM with your documentation.

Report Description

This table lists the PeopleSoft Sales reports, sorted alphanumerically by report ID.

Report ID and Report Name	Description	Navigation	Run Control Page
RSFC1000 Task Summary Report	Lists information about a sales representative's tasks on leads and opportunities: start date, end date, customer, and status.	Sales, Reports, Task Summary	RUN_RSFC1000
RSFC1001 Company	Lists information about the companies with which you do business, including the customer ID, name, web site, and phone number.	Sales, Reports, Company	RUN_RSFC1001
RSFC1002 Customer Revenue Ranking By Product Group	Lists customers by revenue generated and product group. Includes customer name, revenue, percentage, total by product group, and grand total.	Sales, Reports, Customer Rev Rank	RUN_RSFC1002
RSFC1003 Forecast By Product Group	Lists forecast information by product group.	Sales, Reports, Forecast by Product Group	RUN_RSFC1003
RSFC1004 Forecast By Sales Users	Lists information about the activities of sales users.	Sales, Reports, Forecast by Sales Rep	RUN_RSFC1004
RSFC1005 Opportunity	Lists information about opportunities.	Sales, Reports, Opportunity	RUN_RSFC1005
RSFC1007 Product Group Review Revenue Analysis	Lists information about revenue, sorted by product group, including forecast name and type, sales model and stage, and total by product group.	Sales, Reports, Product Group Revenue	RUN_RSFC1007

Report ID and Report Name	Description	Navigation	Run Control Page
RSFC1009 Revenue Fallout Analysis	Lists information about revenue fallout, including customer name, opportunity, close date, revenue, fallout reason, and totals by sales stage, territory, and business unit.	Sales, Reports, Revenue Fallout Analysis	RUN_RSFC1009
RSFC1010 Customer Revenue Ranking By Industry	Lists information about generated revenue, sorted by industry.	Sales, Reports, Rank By Industry	RUN_RSFC1010
RSFC1011 Customer Revenue Ranking By Region	Lists customer information, sorted by revenue.	Sales, Reports, Rank By Region	RUN_RSFC1011
RSFC1013 Product for Open Opportunities	Lists information about product lines and products, including associated opportunity name, quantity , unit of measure, and price.	Sales, Reports, Products Open Opportunity	RUN_RSFC1013

CHAPTER 2

Report Samples

This chapter provides report samples.

For the online samples of these reports, see the PDF files that are published on CD-ROM with your online documentation.



Report ID: RSFC1000

PeopleSoft

Page No. 1

Run Date: 06/04/2004

Run Time: 12:16:18 PM

Task Summary Report

From 3/15/2004 Thru 3/31/2004

Assigned To: Gomez,Carol

Sales User ID 300023

<u>Start Date</u>	<u>End Date</u>	<u>Status</u>	<u>Source</u>	<u>Name of Lead or Opportunity</u>
<u>Customer</u>			<u>Contact</u>	
3/23/2004 Wayne Industries		OPEN	OPPRT Cobblepot,Oswald	Wayne Ind. - New Product Push
Task: Send Product Information Email product information to Oswald.				
3/30/2004 Falcon Group		OPEN	OPPRT Cairo,Joel	Falcon Group - New Products
Task: Send Product Information Send Product Information to Joel and Sam				
3/29/2004 Vocal Group		OPEN	OPPRT Dobbs,Calvin	Vocal Group - Product Interest
Task: Send Literature Send Product Information to Leonard.				
3/23/2004 Temple Worldwide Electronics		CMPL	OPPRT Carman,Jake	Temple - New Product Interest
Task: Call to gauge interest.				
3/24/2004 Temple Worldwide Electronics		CMPL	OPPRT Carman,Jake	Temple - New Product Interest
Task: Send product literature				
3/25/2004 Temple Worldwide Electronics		CMPL	OPPRT Carman,Jake	Temple - New Product Interest
Task: Convert to Opportunity				
3/29/2004 Hudsucker Industries		CMPL	OPPRT Barnes,Norville	Hudsucker - Custom Packages
Task: Send Product Information				



Report ID: RSFC1001

PeopleSoft

Run Time: 12:23:25 PM
Page No. 1

Run Date: 06/04/2004

Customer Report

Person ID: 300019

Set ID: IPROD

Customer Name: Haas Engineering

Web Site: www.peoplesoft-haasengineering.com

Phone Type

Business

Country Code

001

Phone

555/402-0099

Installed Products

Product:D	Description	Ship Date	Quantity	PO ID
SR1001	Accu - Chill Air Conditioner	05/28/2002	1.00	
SR1009	24.7 cu. Ft. Refrigerator w/Fc	01/22/2002	1.00	

Agreements

<u>Agreement Template</u>	<u>Agreement Code</u>	<u>Num</u>	<u>Start Date</u>	<u>End Date</u>	<u>PO ID</u>
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Open Cases

PriorityStatusCase ID Last Name First Name Summary



Report ID: RSFC1001

PeopleSoft

Customer Report

Run Time: 12:23:25 PM
Page No. 2
Run Date: 06/04/2004

Leads

Lead Status

Converted to Opportunity

Lead Rating

<u>Lead ID</u>	<u>Territory</u>	<u>Contact</u>
100300006	SF Bay Area	Ericson,Paul
100300006	SF Bay Area	Hunter,Nancy
100300006	SF Bay Area	Newsome,Jerry
100300006	SF Bay Area	Ericson,Paul
100300006	SF Bay Area	Hunter,Nancy
100300006	SF Bay Area	Newsome,Jerry

Contacts

NameTitleOffice Email Address

Aluri,Ahmed Support Manager aaluri@haaseng_psft.com

Phone TypePhone

555/421-9020

Bazil,Julie Admin julie@haaseng_psft.com

Phone TypePhone

555/444-1231

Ericson,Paul Vice President pericson@haaseng_psft.com

Phone TypePhone

555/232-9011

Hunter,Nancy nhunter@haaseng_psft.com

Phone TypePhone

555/421-0913

Newsome,Jerry jnewsome@haaseng_psft.com

Phone TypePhone

555/492-1002

Sites

Site IDDescrPhoneExtension



Report ID: RSFC1002

PeopleSoft

Customer Revenue Ranking By Product Group

Page No.

1

Run Date:

6/4/2004

Run Time:

1:31:24 PM

From Date: 1/1/2002 To Date: 12/31/2004

Product Group: WALK-INS

Business Unit: APP01

Product Descr: Walk-In Coolers

<u>Customer Name</u>	<u>Revenue</u>	<u>Currency</u>	<u>Total %</u>
Arnold Ice Company	100,000.00	USD	40.80
Explore Design Center	77,852.50	USD	31.76
Parker-Lowell Drug Company	67,264.40	USD	27.44
	<u>245,116.90</u>		<u>100.00</u>
Total for Product Group:	<u>245,116.90</u>		
Grand Total:	<u>245,116.90</u>		



Report ID: RSFC1003

PeopleSoft

Page No.

1

Forecast By Product Group Report

Run Date:

06/04/2004

Run Time:

2:15:24 PM

Product Group : All

Forecast Type : OPEN

Currency : USD

Forecast TypeRevenue%Total

Business Unit : APP01

Product Group : DISH-WASH Dish Washer

Product ID: SR1015 24 in. Dishwasher 5 Cycles S15

OPEN

10,000.00

100.00

Total Revenue for Product ID: SR1015

10,000.00

Total Revenue for Product Group: DISH-WASH

10,000.00

100.00

Product Group : FREEZER Chest Freezer

Product ID: SR3000 Sectional Walk-in Freezer

OPEN

361,000.00

100.00

Total Revenue for Product ID: SR3000

361,000.00

Total Revenue for Product Group: FREEZER

361,000.00

100.00

Product Group : WALK-INS Walk-In Coolers

Product ID: SR2900 Custom Build Freezer Package

OPEN

22,790.25

100.00

Total Revenue for Product ID: SR2900

22,790.25

Total Revenue for Product Group: WALK-INS

22,790.25

100.00

Total Revenue for Business Unit: APP01

393,790.25



Forecast Report by Sales User

Forecast Category

Revenue

Sales User

Emman, Henry

Forecast ID

2004 JUNE

Time Frame Period

2004 BY QUARTER

<u>Opportunity Name</u>	<u>Sales Stage</u>	<u>Forecast Type</u>	<u>Close Date</u>	<u>Revenue</u>	<u>Confid. %</u>	<u>Close %</u>	<u>Curr</u>
Replacement Solution	DEVELOP PROPOS,	OPEN	03/23/2004	4,000.00	45.00	50.00	USD
Replacement Solution	DEVELOP PROPOS,	OPEN	03/23/2004	9,116.10	45.00	50.00	USD
Replacement Solution	DEVELOP PROPOS,	OPEN	03/23/2004	144,400.00	45.00	50.00	USD
Total For the Timeframe Period	2004 BY QUARTER			157,516.10			
Total For the Forecast ID	2004 JUNE			157,516.10			
Total For the Sales User	Emman, Henry			157,516.10			



Report ID: RSFC1005

PeopleSoft
Opportunity Report**Page No.** 1
Run Date: 6/4/2004
Run Time: 12:32:47 PM**Customer :** Shoreview Medical

Contact:	Pepper	Jack	Opportunity Id:		Business Unit:	APP01
Sales Rep:	Murphy, Terry		Total:	0.00	Currency:	USD
Stage:	NEGOTIATE AND CLOSE		Close Date:	7/14/2004	Confidence Pct Close:	25.00
Territory:	BAY_AREA				Stage Pct Close:	60.00

Competitors

Company	Product	Notes
----------------	----------------	--------------

Contact

Name		Work Phone	Ext	Role
Mark	McGriffin	555/367-4000	4984	General Manager
Mike	Golden	555/367-4000	4902	Contact
Steve	Henry	555/367-4000	6539	Consultant

Sales Team

Name	Type	Phone	Ext	Role
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Needs

Priority	Req. Date	Date Fullfilled	Description
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Quote

Order No	Order Type	Price	When Added	Expires On
CRQ0300050	Quote	52,558.55	10/7/2002 1:55:35PM	11/6/2002
CRQ0300056	Quote	53,603.55	10/7/2002 4:53:55PM	11/6/2002

Activity

Start Date	Status	Task Type	Description
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Time Frame : 2004 BY QUARTER-1H2004

Currency : USD

Forecast Name : 2004 JUNE

Forecast Category : Revenue Forecast

	<u>Forecast Type</u>	<u>Revenue</u>
Business Unit : APP01		
Territory : SF Bay Area		
Product Group : Chest Freezer		
Product : Sectional Walk-in Freezer		
Sales Model : PSFT - Knowledge Enabled Sales		
Sales Stage :	Develop Proposal for Customer	OPEN
		361,000.00
Total:		<u>361,000.00</u>
Total By Product Group		<u>361,000.00</u>
Product Group : Dish Washer		
Product : 24 in. Dishwasher 5 Cycles S15		
Sales Model : PSFT - Knowledge Enabled Sales		
Sales Stage :	Develop Proposal for Customer	OPEN
		10,000.00
Total:		<u>10,000.00</u>
Total By Product Group		<u>10,000.00</u>
Product Group : Walk-In Coolers		
Product : Custom Build Freezer Package		
Sales Model : PSFT - Knowledge Enabled Sales		
Sales Stage :	Develop Proposal for Customer	OPEN
		22,790.25
Total:		<u>22,790.25</u>
Total By Product Group		<u>22,790.25</u>



From Date : 1/1/2003 Thru Date : 12/31/2004

Business Unit : APP01 Currency : USD

Tree IPROD_WORLD Territory SOUTHERN_CAL

Sales Stage : Retain Customer

<u>Customer</u>	<u>Opportunity</u>	<u>Close Date</u>	<u>Revenue</u>	<u>Reason</u>	<u>% Total</u>
Boris May & Company	Custom Freezer Increase Sale	6/4/2004	275,000.00	Customer Cancels Purchase	100.00
Total By Sales Stage			275,000.00		
Total By Tree/Territory			275,000.00		100.00
Total By Business Unit			275,000.00		



Report ID: RSFC1010

PeopleSoft
Customer Revenue Ranking By Industry

Page No. 1
Run Date: 6/4/2004
Run Time: 1:57:15 PM

Date From: 01/01/2003 Date Thru: 12/31/2004

Industry ID: %

Business Unit: APP01

Industry Descr: Appliances-Commercial

<u>Name</u>	<u>Revenue</u>	<u>Currency</u>	<u>Total %</u>
Explore Design Center	77,852.50	USD	100.00
	<u>77,852.50</u>		<u>30.94</u>

Industry Descr: Cargo and Freight

<u>Name</u>	<u>Revenue</u>	<u>Currency</u>	<u>Total %</u>
Arnold Ice Company	100,000.00	USD	100.00
	<u>100,000.00</u>		<u>39.75</u>

Industry Descr: Pharmaceutical Services and Goods

<u>Name</u>	<u>Revenue</u>	<u>Currency</u>	<u>Total %</u>
Parker-Lowell Drug Company	67,264.40	USD	91.22
Explore Design Center	6,473.40	USD	8.78
	<u>73,737.80</u>		<u>29.31</u>
	<u>251,590.30</u>		
Grand Total:	<u>251,590.30</u>		



Report ID: RSFC1011

PeopleSoft

Page No. 1
Run Date: 6/4/2004
Run Time: 2:00:19 PM

Customer Revenue Ranking By Region

Date From: 1/1/2004 Date Thru: 6/30/2004

Business Unit: APP01

Region: Northern California

Name	Revenue	Currency	Total %
Arnold Ice Company	100,000.00	USD	100.00
Total	<u>100,000.00</u>		<u>39.75</u>

Region: Western

Name	Revenue	Currency	Total %
Explore Design Center	84,325.90	USD	55.63
Parker-Lowell Drug Company	67,264.40	USD	44.37
Total	<u>151,590.30</u>		<u>60.25</u>

Grand Total	<u><u>251,590.30</u></u>
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Person ID: 300019 - Murphy, Terry

Product Group: WALK-INS - Walk-In Coolers

<u>Product ID</u>	<u>Opportunity Name</u>	<u>Qty</u>	<u>UOM</u>	<u>Price</u>	<u>Cost</u>	<u>Curr</u>
SR2000	Haas - Cafeteria Project	1.00	EA	6,014.40	6,014.40	USD
Walk-In Freezer 5ft 10in x 11						
SR2000	Replacement Solution	10.00	EA	6,014.40	60,144.00	USD
Walk-In Freezer 5ft 10in x 11						
SR2000	Freezer Upgrade	3.00	EA	6,014.40	18,043.20	USD
Walk-In Freezer 5ft 10in x 11						
SR2010	Freezer Upgrade	4.00	EA	6,606.00	26,424.00	USD
Walk-In Freezer 7ft 9in x 11ft						
SR2900	Hudsucker - Custom Packages	3.00	EA	5,122.30	15,366.89	USD
Custom Build Freezer Package						
SR2900	Shoreview - Custom Freezer	11.00	EA	4,873.05	53,603.55	USD
Custom Build Freezer Package						
SR2900	Replacement Solution	5.00	EA	4,558.05	22,790.25	USD
Custom Build Freezer Package						
Total For Product Group		37.00		202,386.29		