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# PeopleSoft Enterprise Sales Reports

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# CHAPTER 1

## PeopleSoft Enterprise Sales Reports

This appendix provides an overview of PeopleSoft Enterprise Sales reports in a summary table of all reports.

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**Note.** For samples of these reports, see the PDF files provided on the documentation CD-ROM.

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### Report Description

This table lists the PeopleSoft Enterprise 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, including task 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, website, 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

# Report Samples

## Task Summary Report

From 3/1/2004 Thru 12/31/2004

Assigned To: Gomez,Carol

Sales User ID 100957

<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
<b>Task:</b> Send Product Information Email product information to Oswald.				
3/25/2004 Wayne Industries	3/25/2004	OPEN	OPPRT Cobblepot,Oswald	Wayne Ind. - New Product Push
<b>Task:</b> Initial Meeting Meet with Oswald to discuss product offerings. This is a first meeting.				
3/30/2004 Falcon Group		OPEN	OPPRT Cairo,Joel	Falcon Group - New Products
<b>Task:</b> Send Product Information Send Product Information to Joel and Sam				
4/12/2004 Falcon Group	4/12/2004	OPEN	OPPRT Cairo,Joel	Falcon Group - New Products
<b>Task:</b> Product Meeting Meet to discuss product set.				
3/29/2004 Vocal Group		OPEN	OPPRT Dobbs,Calvin	Vocal Group - Product Interest
<b>Task:</b> Send Literature Send Product Information to Leonard.				
4/7/2004 Vocal Group	4/7/2004	OPEN	OPPRT Dobbs,Calvin	Vocal Group - Product Interest
<b>Task:</b> Set Meeting Set up meeting with Vocal Group.				
3/25/2004 Temple Worldwide Electronics		CMPL	OPPRT Carman,Jake	Temple - New Product Interest
<b>Task:</b> Convert to Opportunity				



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**

<u>Product:D</u>	<u>Description</u>	<u>Ship Date</u>	<u>Quantity</u>	<u>PO ID</u>
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**PriorityStatus

<u>Case ID</u>	<u>Last Name</u>	<u>First Name</u>	<u>Summary</u>
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**Leads**

Lead Status      Converted to Opportunity

Lead Rating

<u>Lead ID</u>	<u>Territory</u>	<u>Contact</u>
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
100300006	SF Bay Area	Ericson,Paul

**Contacts**

<u>Name</u>	<u>Title</u>	<u>Office Email Address</u>	<u>Phone Type</u>	<u>Phone</u>
Aluri,Ahmed	Support Manager	aaluri@haaseng_psft.com		
				555/421-9020
Bazil,Julie	Admin	julie@haaseng_psft.com		
				555/444-1231
Ericson,Paul	Vice President	pericson@haaseng_psft.com		
				555/232-9011
Hunter,Nancy		nhunter@haaseng_psft.com		
				555/421-0913
Newsome,Jerry		jnewsome@haaseng_psft.com		
				555/492-1002

**Sites**

<u>Site ID</u>	<u>Descr</u>	<u>Phone</u>	<u>Extension</u>
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**Customer:** Chad Rawlings

**Opportunity:** Sales Opp 3 **Opportunity Id:** 20020077

**Contact:** Rawlings Chad **Business Unit:** US200

**Sales Rep:** Stephen Ray **Actual Total:** 0.00 **Currency:** USD

**Status:** Open **Close Date:** 3/30/2002 **Confidence Pct Close:** 80.00

**Territory:** CENTRAL US200 **Stage:** DEVELOP PROPOSAL **Stage Pct Close:** 50.00

**Competitors**

Company	Product	Notes
Alan's Appliance Recycling		
Strong Presence	10010	

**Contact**

Name	Work Phone	Ext	Role
Chad Rawlings			General Manager

**Sales Team**

Name	Type	Phone	Ext	Role
Stu Marx	SMGR	555 5551260		0001

**Needs**

Priority	Req. Date	Date Fulfilled	Description
High	2/28/2002		Customer needs spare parts for Air Conditioners

**Quote**

Order No	Order Type	Price	When Added	Expires On
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**Activity**

Start Date	Status	Task Type	Description
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**Product Detail**

<b>Group</b>	<b>Group Description</b>	<b>ID</b>	<b>Product Description</b>	<b>Qty</b>	<b>Revenue</b>
A/C	Air Conditioner	10010	Air Cond, Fan	600.00	23,928.00
A/C	Air Conditioner	10011	Air Cond, Control Unit	250.00	37,495.00
				<b>Total</b>	61,423.00

From Date: 10/1/2007 To Date: 12/31/2007

Product Group: A/C  
 Business Unit: APP01  
 Product Descr: Split Unit Air Conditioner

<u>Customer Name</u>	<u>Revenue</u>	<u>Currency</u>	<u>Total %</u>
Shoreview Medical	4,000.00	USD	100.00
	<b>4,000.00</b>		<b>100.00</b>
<b>Total for Product Group:</b>	<b>4,000.00</b>		
<b>Grand Total:</b>	<b>4,000.00</b>		

Person ID: 300023 - Lee,Burt

Product Group: A/C - Split Unit Air Conditioner

<u>Product ID</u>	<u>Opportunity Name</u>	<u>Qty</u>	<u>UOM</u>	<u>Price</u>	<u>Cost</u>	<u>Curr</u>
SR1001	Shoreview Medical	10.00	EA	449.88	4,498.80	USD
Accu - Chill Air Conditioner						
<b>Total For Product Group</b>		<b>10.00</b>		<b>4,498.80</b>		

Date From: 12/01/2007 Date Thru: 12/31/2007

Industry ID: MEDICAL SU

Business Unit: APP01

Industry Descr: Medical Supplies

<u>Name</u>	<u>Revenue</u>	<u>Currency</u>	<u>Total %</u>
Shoreview Medical	6,210.00	USD	100.00
	<hr/>		<hr/>
	6,210.00		100.00
	<hr/>		<hr/>
	6,210.00		
	<hr/>		<hr/>
Grand Total:	6,210.00		
	<hr/>		<hr/>

Date From: 1/1/2004 Date Thru: 12/31/2007

Business Unit: APP01

Region: Northern California

Name	Revenue	Currency	Total %
Arnold Ice Company	100,000.00	USD	100.00
<b>Total</b>	<b>100,000.00</b>		<b>38.79</b>

Region: Western

Name	Revenue	Currency	Total %
Parker-Lowell Drug Company	67,264.40	USD	42.63
Shoreview Medical	6,210.00	USD	3.94
Explore Design Center	84,325.90	USD	53.44
<b>Total</b>	<b>157,800.30</b>		<b>61.21</b>

<b>Grand Total</b>	<b>257,800.30</b>
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## Forecast By Product Group Report

Product Group : All

Forecast Type : OPEN

Currency : USD

		<u>Forecast Type</u>	<u>Revenue</u>	<u>%Total</u>
<b>Business Unit : APP01</b>				
<b>Product Group :</b>	<b>REFRIDGE</b>	Refrigerator		
<b>Product ID:</b>	<b>9999</b>	Refrigerator - Configurable		
		OPEN	60,019.50	100.00
<b>Total Revenue for Product ID:</b>	<b>9999</b>		<b>60,019.50</b>	
<b>Product ID:</b>	<b>D9998</b>	Wine & Beverage Refrigerator		
		OPEN	1,200.00	100.00
<b>Total Revenue for Product ID:</b>	<b>D9998</b>		<b>1,200.00</b>	
<b>Product ID:</b>	<b>D9999</b>	Refrigerator, Custom		
		OPEN	5,000.00	100.00
<b>Total Revenue for Product ID:</b>	<b>D9999</b>		<b>5,000.00</b>	
<b>Product ID:</b>	<b>WESA4055</b>	Complete Installation Service		
		OPEN	4,500.00	100.00
<b>Total Revenue for Product ID:</b>	<b>WESA4055</b>		<b>4,500.00</b>	
<b>Total Revenue for Product Group:</b>	<b>REFRIDGE</b>		<b>70,719.50</b>	<b>100.00</b>
<b>Product Group :</b>	<b>WALK-INS</b>	Walk-In Coolers		
<b>Product ID:</b>	<b>SR2010</b>	Walk-In Freezer 7ft 9in x11ft		
		OPEN	21,139.20	100.00
<b>Total Revenue for Product ID:</b>	<b>SR2010</b>		<b>21,139.20</b>	
<b>Product ID:</b>	<b>SR2900</b>	Custom Build Freezer Package		
		OPEN	22,526.94	100.00
<b>Total Revenue for Product ID:</b>	<b>SR2900</b>		<b>22,526.94</b>	
<b>Total Revenue for Product Group:</b>	<b>WALK-INS</b>		<b>43,666.14</b>	<b>100.00</b>
<b>Total Revenue for Business Unit:</b>	<b>APP01</b>		<b>114,385.64</b>	

## Forecast Report by Sales User

<b>Forecast Category</b>	<b>Revenue</b>						
<b>Sales User</b>	<b>Lee,Burt</b>						
<b>Forecast ID</b>	<b>2009 SEPTEMBER</b>						
<b>Time Frame Period</b>	<b>2009 BY MONTH-SI</b>						
<b><u>Opportunity Name</u></b>	<b><u>Sales Stage</u></b>	<b><u>Forecast Type</u></b>	<b><u>Close Date</u></b>	<b><u>Revenue</u></b>	<b><u>Confid. %</u></b>	<b><u>Close %</u></b>	<b><u>Curr</u></b>
OneCool Appliances	RETAIN CUSTOMEF	OPEN	09/14/2009	600.00	90.00	100.00	USD
OneCool Appliances	RETAIN CUSTOMEF	OPEN	09/14/2009	3,000.00	90.00	100.00	USD
OneCool Appliances	RETAIN CUSTOMEF	OPEN	09/14/2009	4,500.00	90.00	100.00	USD
OneCool Appliances	RETAIN CUSTOMEF	OPEN	09/14/2009	75,000.00	90.00	100.00	USD
Total For the Timeframe Period	<b>2009 BY MONTH-SI</b>			<b>83,100.00</b>			
Total For the Forecast ID	<b>2009 SEPTEMBER</b>			<b>83,100.00</b>			
Total For the Sales User	<b>Lee,Burt</b>			<b>83,100.00</b>			

**Forecast Report by Sales User**

<u>Forecast Category</u>	<u>Revenue</u>						
<b>Sales User</b>	<b>Murphy, Terry</b>						
<u>Forecast ID</u>	<u>2009 SEPTEMBER</u>						
<u>Time Frame Period</u>	<u>2009 BY MONTH-S</u>						
<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>
OneCool Appliances	RETAIN CUSTOMEF	OPEN	09/14/2009	3,000.00	90.00	100.00	USD
OneCool Appliances	RETAIN CUSTOMEF	OPEN	09/14/2009	50,000.00	90.00	100.00	USD
OneCool Appliances	RETAIN CUSTOMEF	OPEN	09/14/2009	2,000.00	90.00	100.00	USD
OneCool Appliances	RETAIN CUSTOMEF	OPEN	09/14/2009	400.00	90.00	100.00	USD
Total For the Timeframe Period		<b>2009 BY MONTH-S</b>		<b>55,400.00</b>			
Total For the Forecast ID		<b>2009 SEPTEMBER</b>		<b>55,400.00</b>			
Total For the Sales User		<b>Murphy, Terry</b>		<b>55,400.00</b>			
<b>Grand Total:</b>				<b>138,500.00</b>			

Time Frame : 2009 BY MONTH-SEP

Currency : USD

Forecast Name : 2009 SEPTEMBER

Forecast Category : Revenue Forecast

Forecast Type

Revenue

Business Unit : APP01

Territory : California

Product Group :

Product : Complete Installation Service

Sales Model : PSFT - Knowledge Enabled Sales

Sales Stage : Retain Customer

OPEN

1,000.00

Total:

1,000.00

Product : Compressor Type A

Sales Model : PSFT - Knowledge Enabled Sales

Sales Stage : Retain Customer

OPEN

125,000.00

Total:

125,000.00

Total By Product Group

126,000.00

Product Group : Chest Freezer

Product : Freezer Maintenance Service

Sales Model : PSFT - Knowledge Enabled Sales

Sales Stage : Retain Customer

OPEN

12,500.00

Total:

12,500.00

Total By Product Group

12,500.00

Revenue Fallout Analysis

From Date : 8/15/2007 Thru Date : 8/15/2007

Business Unit : US200

Currency : USD

Tree WORLD Territory WORLD

Sales Stage : Qualify Customer

<u>Customer</u>	<u>Opportunity</u>	<u>Close Date</u>	<u>Revenue</u>	<u>Reason</u>	<u>% Total</u>
MMA Property Management Grd	MMA Property Management Gro	8/15/2007	1,500.00	Lost Deal on Features	100.00
<b>Total By Sales Stage</b>			<b>1,500.00</b>		
<b>Total By Tree/Territory</b>			<b>1,500.00</b>		<b>100.00</b>
<b>Total By Business Unit</b>			<b>1,500.00</b>		