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PEOPLESOFT

PeopleSoft Sales 9.1 Reports

May 2012

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Report Samples

PeopleSoft Sales Reports

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

Note. All reports in this appendix are Crystal reports and some of them can also be run using Oracle Business Intelligent Publisher (BI Publisher or BIP) as specified. BI Publisher is a template-based reporting solution that have been integrated into PeopleTools. For samples of these reports, see the Portable Document Format (PDF) files that are published with your online 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	This report lists information about a sales representative's tasks on leads and opportunities, including task start date, end date, customer, and status. It can be run by either Crystal Reports or BI Publisher.	Sales, Reports, Task Summary, Task Summary Report	RUN_RSFC1000
RSFC1001 Company Report	This report lists information about companies with which you do business (that is, companies that have opportunities created for them in the system), including the customer ID, name, website, and phone number.	Sales, Reports, Company, Company Report	RUN_RSFC1001
RSFC1002 Customer Revenue Ranking By Product Group	This report lists customers by revenue generated and product group. It includes customer name, revenue, percentage, total by product group, and grand total. This report can be run by either Crystal Reports or BI Publisher.	Sales, Reports, Customer Rev Rank, Customer Revenue Ranking By Product Group	RUN_RSFC1002

Report ID and Report Name	Description	Navigation	Run Control Page
RSFC1003 Forecast By Product Group	This report lists forecast information by product group. It can be run by either Crystal Reports or BI Publisher.	Sales, Reports, Forecast by Product Group, Forecast By Product Group	RUN_RSFC1003
RSFC1004 Forecast By Sales User	This report lists information about the activities of sales users. It can be run by either Crystal Reports or BI Publisher.	Sales, Reports, Forecast by Sales Rep, Forecast by Sales User	RUN_RSFC1004
RSFC1005 Opportunity Report	This report lists information about opportunities.	Sales, Reports, Opportunity, Opportunity Report	RUN_RSFC1005
RSFC1007 Product Group Review Revenue Analysis	This report lists information about revenue, sorted by product group, including forecast name and type, sales model and stage, and total by product group. It can be run by either Crystal Reports or BI Publisher.	Sales, Reports, Product Group Revenue, Product Group Review Revenue Analysis	RUN_RSFC1007
RSFC1009 Revenue Fallout Analysis	This report 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, Revenue Fallout Analysis	RUN_RSFC1009
RSFC1010 Customer Revenue Ranking By Industry	This report lists information about generated revenue, sorted by industry. It can be run by either Crystal Reports or BI Publisher.	Sales, Reports, Rank By Industry, Customer Revenue Ranking By Industry	RUN_RSFC1010
RSFC1011 Customer Revenue Ranking By Region	This report lists customer information, sorted by revenue. It can be run by either Crystal Reports and BI Publisher.	Sales, Reports, Rank By Region, Customer Revenue Ranking By Region	RUN_RSFC1011
RSFC1013 Products for Open Opportunities	This report lists information about product lines and products, including associated opportunity name, quantity, unit of measure, and price. It can be run by either Crystal Reports or BI Publisher.	Sales, Reports, Products Open Opportunity, Products for Open Opportunities	RUN_RSFC1013

Task Summary Report

From 3/1/2004 Thru 12/31/200

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
Task: 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
Task: 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
Task: 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
Task: Product Meeting Meet to discuss product set.				
3/29/2004 Vocal Group		OPEN	OPPRT Dobbs,Calvin	Vocal Group - Product Interest
Task: Send Literature Send Product Information to Leonard.				
4/7/2004 Vocal Group	4/7/2004	OPEN	OPPRT Dobbs,Calvin	Vocal Group - Product Interest
Task: Set Meeting Set up meeting with Vocal Group.				
3/25/2004 Temple Worldwide Electronics		CMPL	OPPRT Carman,Jake	Temple - New Product Interest
Task: Convert to Opportunity				



Report ID: RSFC1001

Oracle
Customer ReportRun Time: 1:55:14 PM
Page No. 1
Run Date: 12/14/2007

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

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		
Bazil,Julie	Admin	julie@haaseng_psft.com		555/421-9020
Ericson,Paul	Vice President	pericson@haaseng_psft.com		555/444-1231
Hunter,Nancy		nhunter@haaseng_psft.com		555/232-9011
Newsome,Jerry		jnewsome@haaseng_psft.com		555/421-0913
				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

Group	Group Description	ID	Product Description	Qty	Revenue
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
				Total	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
	4,000.00		100.00
Total for Product Group:	4,000.00		
Grand Total:	4,000.00		

Products for Open Opportunities Report

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						
Total For Product Group		10.00		4,498.80		

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
	<u>6,210.00</u>		<u>100.00</u>
	<u>6,210.00</u>		
Grand Total:	<u>6,210.00</u>		

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
Total	100,000.00		38.79

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
Total	157,800.30		61.21

Grand Total 257,800.30

Forecast By Product Group Report

Product Group : All

Forecast Type : OPEN

Currency : USD

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

Forecast Report by Sales User

Forecast Category

Revenue

Sales User

Lee,Burt

Forecast ID

2009 SEPTEMBER

Time Frame Period

2009 BY MONTH-S

<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 CUSTOMER	OPEN	09/14/2009	600.00	90.00	100.00	USD
OneCool Appliances	RETAIN CUSTOMER	OPEN	09/14/2009	3,000.00	90.00	100.00	USD
OneCool Appliances	RETAIN CUSTOMER	OPEN	09/14/2009	4,500.00	90.00	100.00	USD
OneCool Appliances	RETAIN CUSTOMER	OPEN	09/14/2009	75,000.00	90.00	100.00	USD
Total For the Timeframe Period	2009 BY MONTH-S			83,100.00			
Total For the Forecast ID	2009 SEPTEMBER			83,100.00			
Total For the Sales User	Lee,Burt			83,100.00			

Forecast Report by Sales User

Forecast Category

Revenue

Sales User

Murphy, Terry

Forecast ID

2009 SEPTEMBER

Time Frame Period

2009 BY MONTH-S

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

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
Total By Sales Stage			1,500.00		
Total By Tree/Territory			1,500.00		100.00
Total By Business Unit			1,500.00		