
PeopleSoft Enterprise Sales 9 Reports

August 2006

PeopleSoft Enterprise Sales 9 Reports
SKU CRM9SFA-R 0806
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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.

Documentation Updates and Printed Documentation

This section discusses how to:

- Obtain documentation updates.
- Download and order printed documentation.

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See Also

Oracle's PeopleSoft Customer Connection, http://www.oracle.com/support/support_peoplesoft.html

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

CHAPTER 1

PeopleSoft Enterprise Sales Reports

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

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

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 |

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.



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

Customer Report

Run Date: 06/04/2004

Person ID: 300019

Set ID: IPROD

Customer Name: Haas Engineering

Web Site: www.peoplesoft-haasengineering.com

| | | |
|-------------------|---------------------|--------------|
| <u>Phone Type</u> | <u>Country Code</u> | <u>Phone</u> |
| Business | 001 | 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> |
|---------------------------|-----------------------|------------|-------------------|-----------------|--------------|
| | | | | | |

Open Cases

| <u>Case ID</u> | <u>Last Name</u> | <u>First Name</u> | <u>Summary</u> |
|----------------|------------------|-------------------|----------------|
| | | | |



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

| <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 |
| | | | <u>Phone Type</u> | <u>Phone</u> |
| | | | | 555/492-1002 |

Sites

| <u>Site ID</u> | <u>Descr</u> | <u>Phone</u> | <u>Extension</u> |
|----------------|--------------|--------------|------------------|
|----------------|--------------|--------------|------------------|



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 |
| | <hr/> | | <hr/> |
| | 245,116.90 | | 100.00 |
| | <hr/> | | |
| Total for Product Group: | 245,116.90 | | |
| | <hr/> | | |
| Grand Total: | 245,116.90 | | |
| | <hr/> | | |



Forecast By Product Group Report

Product Group : All

Forecast Type : OPEN

Currency : USD

Forecast Type

Revenue

%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 Involvement | 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 |
|------|------|-------|-----|------|
|------|------|-------|-----|------|

Needs

| Priority | Req. Date | Date Fullfilled | Description |
|----------|-----------|-----------------|-------------|
|----------|-----------|-----------------|-------------|

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 |
|------------|--------|-----------|-------------|
|------------|--------|-----------|-------------|



Time Frame : 2004 BY QUARTER-1H2004

Currency : USD

Forecast Name : 2004 JUNE

Forecast Category : Revenue Forecast

Forecast Type

Revenue

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: 361,000.00

Total By Product Group 361,000.00

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: 10,000.00

Total By Product Group 10,000.00

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: 22,790.25

Total By Product Group 22,790.25



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 | | |



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 |
| | 77,852.50 | | 30.94 |

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 |
| | 100,000.00 | | 39.75 |

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 |
| | 73,737.80 | | 29.31 |
| | 251,590.30 | | |
| Grand Total: | 251,590.30 | | |



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 | 100,000.00 | | 39.75 |

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 | 151,590.30 | | 60.25 |

Grand Total 251,590.30



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 | | |

