CON7186 - Solving Real-World Problems with Sales Cloud Analytics

Edward Dewolf
CX Center of Excellence Manager
Solution Consulting Western Europe
October 3rd, 2017

ORACLE
OPEN
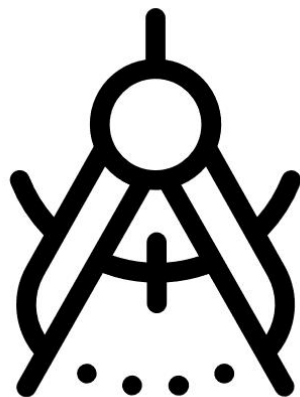WORLD

October 1–5, 2017
SAN FRANCISCO, CA

ORACLE®

Safe Harbor Statement

The following is intended to outline our general product direction. It is intended for information purposes only, and may not be incorporated into any contract. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions. The development, release, and timing of any features or functionality described for Oracle's products remains at the sole discretion of Oracle.

ORACLE®

Solving Real-World Problems with Sales Cloud Analytics

Lifecycle of a report

Design	Build	Use
Not all needed data is available in Sales Cloud	Cannot find the right data in Sales Cloud	My reports are not being used

ORACLE®

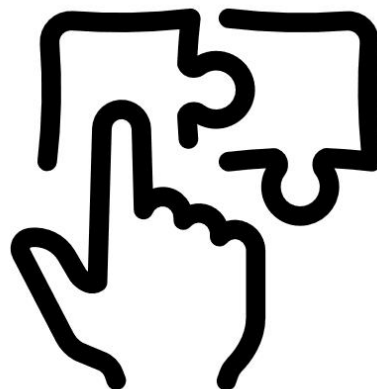# Solving Real-World Problems with Sales Cloud Analytics

Lifecycle of a report

Design

Build

Use

Not all needed data
is available in Sales Cloud

Cannot find
the right data in Sales Cloud

My reports
are not being used

ORACLE®

Solving Real-World Problems with Sales Cloud Analytics

Not all needed data is available in Sales Cloud

- Importing Data into Sales Cloud

Create a Custom Object   (Re)Load Data   Create Custom Subject Area   Build reports in Sales Cloud

- Combine data from mutliple sources with Oracle Analytics Cloud

Get an Oracle Analytics Subscription   Define Data Sources   Create Visualizations   Refresh Data

Solving Real-World Problems with Sales Cloud Analytics

Import into Sales Cloud

- Full Control
- Blend into Sales Cloud
- Blend into Sales Cloud Mobile

- Data Import Mechanism
- Data Duplication
- Only Real-Time Data

Analytics Cloud

- Any source, even MS Excell
- Fancy Data Visualizations
- Highlights & Projections

- Dependency on other sources
- Extra Tool
- Data Security

Solving Real-World Problems with Sales Cloud Analytics

Lifecycle of a report

Design

Build

Use

Not all needed data
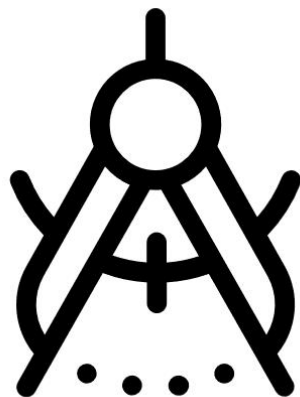is available in Sales Cloud

Cannot find
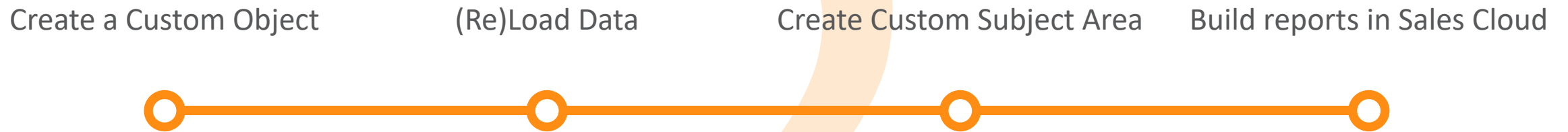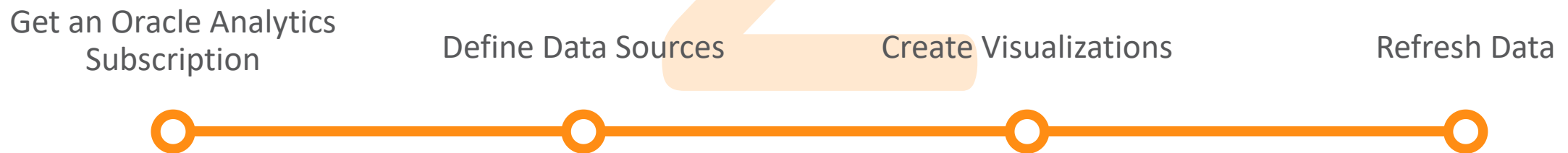the right data in Sales Cloud

My reports
are not being used

Solving Real-World Problems with Sales Cloud Analytics

Cannot find the right data in Sales Cloud

Question

How many Subject Areas

come with a Sales Cloud instance?

ORACLE®

Benefits - Action Items Real Time   Benefits - Enrollment Opportunities Real Time   Benefits - Enrollments Real Time   Benefits - Potential Life Events Real Time   Benefits - Setup Real Time   Budgetary Control - Transactions Real Time   Cash Management - Bank Statement Balances Real Time   Cash Management - Bank Statement Line Charges Real Time   Cash Management - Bank Statements Real Time   Cash Management - External Cash Transactions Real Time   Compensation - Salary Details Real Time   Compensation - Salary History Details Real Time   Compensation - Stock Details Real Time   Compensation - Workforce Compensation Budgets Real Time   Compensation - Workforce Compensation Real Time   Costing - COGS and Gross Margin Real Time   Costing - Cost Accounting Real Time   Costing - Inventory Valuation Real Time   Costing - Inventory Valuation   Costing - Item Cost Real Time   Costing - Item Cost   Costing - Margin Analysis   Costing - Receipt Accounting Real Time   CRM - Sales Predictor Input   CRM - Sales Predictor ROI Reports   CRM - Sales Predictor Sales Estimation Analysis   Distributed Order Orchestration - Fulfillment Lines Real Time   Distributed Order Orchestration - Order Headers Real Time   Distributed Order Orchestration - Order Holds Real Time   Distributed Order Orchestration - Order Lines Real Time   Distributed Order Orchestration - Price Adjustments Real Time   Distributed Order Orchestration - Process Instances Real Time   Distributed Order Orchestration - Process Instances   Dynamic Currency Preference   Employee Expenses - Credit Card   Employee Expenses - Overview   Employee Expenses - Violations   Enterprise Contracts - Contracts Real Time   Expenses - Employee Expense Overview Real Time   Expenses - Expense Transactions Real Time   Financials - Account Reconciliation   Financials - AP Balance   Financials - AP Holds   Financials - AP Invoice Aging   Financials - AP Overview   Financials - AP Transactions   Financials - AR Balance   Financials - AR Invoice Aging   Financials - AR Overview   Financials - AR Transactions   Financials - Asset Acquisition   Financials - Asset Balance   Financials - Asset Depreciation   Financials - Asset Lease Payment   Financials - Asset Overview   Financials - Asset Retirement   Financials - Asset Utilization   Financials - Budget and Expenses (PeopleSoft Standard)   Financials - Budgetary Control - Detail Transactions   Financials - Budgetary Control - Expense   Financials - Budgetary Control - Revenue   Financials - GL Balance (Essbase)   Financials - GL Balance Sheet   Financials - GL Budget and Expenses   Financials - GL Cash Flow   Financials - GL Cost of Goods Sold Analysis   Financials - GL Detail Transactions   Financials - Profitability - Company   Financials - Profitability - Customer   Financials - Profitability - Product   Financials - Revenue Analysis   Financials - Subledger Accounting - Control Balances   Financials - Subledger Accounting - Detail Transactions   Financials - Subledger Accounting - Supporting Reference Balances   Financials - US Federal - GL Balance Sheet   Financials - US Federal - GL Detail Transactions   Financials Common Module - Intercompany Transactions Real Time   Fixed Assets - Asset Depreciation Real Time   Fixed Assets - Asset Transactions Real Time   General Ledger - Balances Real Time   General Ledger - Journals Real Time   General Ledger - Period Status Real Time   General Ledger - Transactional Balances Real Time   Human Capital Management - Approval Notification Archive Real Time   Human Resources - Absence and Leave Accrual   Human Resources - Budget Planning   Human Resources - Compensation   Human Resources - Learning Enrollment and Completion   Human Resources - Payroll   Human Resources - Recruitment   Human Resources - Succession Planning   Human Resources - Talent Profile Management   Human Resources - Time and Labor   Human Resources - Workforce Compensation   Human Resources - Workforce Deployment   Human Resources - Workforce Effectiveness   Human Resources - Workforce Frozen Snapshots   Human Resources - Workforce Gains and Losses   Human Resources - Workforce Generic Hierarchy Gains and Losses   Incentive Compensation - Attainments Real Time   Incentive Compensation - Compensation Plan Assignments Real Time   Incentive Compensation - Credits Real Time   Incentive Compensation - Disputes Real Time   Incentive Compensation - Earning and Attainment Summary Real Time   Incentive Compensation - Earnings Real Time   Incentive Compensation - Participant Balances Real Time   Incentive Compensation - Participant Compensation Plan Real Time   Incentive Compensation - Participant Detail Real Time   Incentive Compensation - Participant Interval Goals Real Time   Incentive Compensation - Participant Period Goals Real Time   Incentive Compensation - Pay Group Assignments Real Time   Incentive Compensation - Payment Plan Assignments Real Time   Incentive Compensation - Payments Real Time   Incentive Compensation - Paysheet Summary Real Time   Incentive Compensation - Performance and Earnings Summary Real Time   Incentive Compensation - Rules Real Time   Incentive Compensation - Transactions Real Time   Innovation Management - Concepts Real Time   Innovation Management - Ideas Real Time   Innovation Management - Portfolio Cost Real Time   Innovation Management - Portfolio Lifecycle Real Time   Innovation Management - Portfolio Resource Real Time   Innovation Management - Portfolio Revenue Real Time   Innovation Management - Portfolios Real Time   Innovation Management - Product Portfolio Real Time   Innovation Management - Product Portfolio Flow Real Time   Innovation Management - Product Proposals Real Time   Innovation Management - Requirements Real Time   Innovation Management - Scenario Lifecycle Real Time   Inventory - Aging   Inventory - Balances   Inventory - Bill of Materials   Inventory - Customer and Supplier Returns   Inventory - Cycle Count   Inventory - Inventory Balance Real Time   Inventory - Inventory Supply Real Time   Inventory - Inventory Transactions Real Time   Inventory - Inventory Turn   Inventory - Transactions   Inventory Organization Real Time   Manufacturing - Actual Production Real Time   Manufacturing - Material Usage Real Time   Manufacturing - Resource Usage Real Time   Manufacturing - Work Order Performance Real Time   Marketing - CRM B2B Customers   Marketing - CRM B2C Customers   Marketing - CRM Campaign Leads   Marketing - CRM Campaign Performance   Marketing - CRM Campaigns and Contacts Real Time   Marketing - CRM Campaigns and Leads Real Time   Marketing - CRM Campaigns and Opportunities Real Time   Marketing - CRM Lead to Order   Marketing - CRM Leads and Opportunities Real Time   Marketing - CRM Leads Real Time   Marketing - CRM Leads   Marketing Segmentation Activities   Marketing Segmentation Agreements   Marketing Segmentation Assets   Marketing Segmentation Cache and Saved Results Real Time   Marketing Segmentation Campaigns   Marketing Segmentation Customer Classifications   Marketing Segmentation Leads   Marketing Segmentation Opportunities   Marketing Segmentation Responses   Marketing Segmentation Sales Accounts   Marketing Segmentation Targets   Partners - CRM Leads and Opportunities Real Time   Partners - CRM Opportunities and Products Real Time   Partners - CRM Partner Classification   Partners - CRM Partner Contact   Partners - CRM Partner Overview   Partners - CRM Partner Programs   Partners - CRM Partner Resource   Partners - CRM Partner Territory   Partners - CRM Partners and Products Real Time   Partners - CRM Registered Leads Real Time   Partners - CRM Sales Account Real Time   Payables Invoices - Installments Real Time   Payables Invoices - Prepayment Applications Real Time   Payables Invoices - Transactions Real Time   Payables Invoices - Trial Balance Real Time   Payables Invoices - Withholding Real Time   Payables Payments - Disbursements Real Time   Payables Payments - Payment History Real Time   Payroll - Calculation Cards Real Time   Payroll - Element Entries Real Time   Payroll - Payments Costing Real Time   Payroll - Payments Distribution Real Time   Payroll - Payments Real Time   Payroll Interface Inbound Records Real Time   Payroll - Payroll Run Costing Real Time   Payroll - Payroll Run Results Real Time   Payroll - Personal Payment Details Real Time   Payroll - Retroactive Pay Real Time   Payroll - User-Defined Tables Real Time   PIM - Change Order   PIM - Item Catalog   PIM - Item   PIM - New Item Request   Procurement - Implemented Change Orders Real Time   Procurement - Pending Change Orders Real Time   Procurement - Purchasing Agreements Real Time   Procurement - Requisitions Real Time   Procurement - Spend Real Time   Procurement and Spend - Invoice Lines   Procurement and Spend - Procure to Pay   Procurement and Spend - Purchase Agreement   Procurement and Spend - Purchase Cycle Lines   Procurement and Spend - Purchase Orders BU Summary   Procurement and Spend - Purchase Orders   Procurement and Spend - Purchase Receipts   Procurement and Spend - Purchase Requisition BU Summary   Procurement and Spend - Purchase Requisitions   Procurement and Spend - Scorecard   Product Development - Affected Item   Product Development - Development   Product Development - Manufacturer Part   Product Management - Change Order Line Real Time   Product Management - Change Order Real Time   Product Management - Components Real Time   Product Management - Cross Reference Item Real Time   Product Management - Item Revisions Real Time   Product Management - New Item Request Line Real Time   Product Management - New Item Request Real Time   Product Management - Related Item Real Time   Product Management - Source System Item Real Time   Product Management - Structures Real Time   Product Management - Trading Partner Item Real Time   Project - Billing   Project - Budget   Project - Commitment   Project - Construction In Progress   Project - Cost GL Reconciliation   Project - Cost   Project - Cross Charge   Project - Earned Value Management   Project - Forecast   Project - Funding   Project - Grants Management - Award Analysis   Project - Grants Management - Award Funding   Project - Performance   Project - Resource Management   Project - Revenue GL Reconciliation   Project - Revenue   Project Billing - Event Real Time   Project Billing - Funding Real Time   Project Billing - Invoices Real Time   Project Billing - Revenue Real Time   Project Control - Budgets Real Time   Project Control - Forecasts Real Time   Project Control - Progress Real Time   Project Costing - Actual Costs Real Time   Project Costing - Assets Real Time   Project Costing - Commitments Real Time   Project Costing - Expenditure Item Performance - Real Time   Project Costing - Process Transaction Real Time   Project Financial Management Real Time   Project Management - Opportunity Integration Real Time   Project Management - Planning Real Time   Project Management - Project Hierarchy Real Time   Project Management - Project Issues Real Time   Project Management - Project Resources Real Time   Project Management - Project Work Items Real Time   Project Management - Resource Real Time   Project Management - Tasks Real Time   Project Resource Management - Resource Management Real Time   Project Resource Management - Resource Pool Real Time   Projects Cross Subject Area Analysis - Real Time   Project Grants Management - Award Analysis Real Time   Projects - Grants Management - Award Funding Real Time   Receivables - Adjustments Real Time   Receivables - BU Receivable Real Time   Receivables - Credit Memo Requests Real Time   Receivables - Customer Account Site Real Time   Receivables - Customer Profile Real Time   Receivables - Miscellaneous Receipts - Receipt Conversion Rate Adjustments Real Time   Receivables - Receipt Details Real Time   Receivables - Revenue Adjustments Real Time   Receivables - Standard Receipts Application Details Real Time   Receivables - Transactions Real Time   Receiving - In-Transit Advanced Shipment Notification Real Time   Receiving - In-Transit Interorganization Inventory Transfers Real Time   Receiving - In-Transit Shipments Real Time   Receiving - Reorganization Receipts Real Time   Receiving - Purchase Receipts Real Time   Receiving - Receipts Real Time   Receiving - Transactions Real Time   Receiving - Unordered Receipts Real Time   Recruiting - Recruiting Real Time   Risk Management Cloud - Assessment Results Real Time   Risk Management Cloud - Compliance Real Time   RTD - Model Analysis   Sales - Backlog History   Sales - Backlog Lines   Sales - Booking Lines   Sales - CRM Account Relationship   Sales - CRM Activity Contact   Sales - CRM Activity Objective   Sales - CRM Activity Resource   Sales - CRM Asset   Sales - CRM Business Plan Objective Split   Sales - CRM Contact Note   Sales - CRM Contact Relationship   Sales - CRM Contact Resource   Sales - CRM Contacts   Sales - CRM Customer Classification   Sales - CRM Customer Note   Sales - CRM Customer Overview   Sales - CRM Customers and Contacts Real Time   Sales - CRM Deal Registration Product   Sales - CRM Deal Registration   Sales - CRM Forecasting and Pipeline Revenue Real Time   Sales - CRM Forecasting   Sales - CRM Historical Forecasting   Sales - CRM Historical Pipeline   Sales - CRM Lead Contact   Sales - CRM Lead Product   Sales - CRM Lead Resource   Sales - CRM Lead Territory   Sales - CRM MDF Budget   Sales - CRM MDF Claim Settlement   Sales - CRM MDF Claim   Sales - CRM MDF Request   Sales - CRM Opportunities and Products Real Time   Sales - CRM Opportunity Assessments   Sales - CRM Opportunity Campaign   Sales - CRM Opportunity Contact   Sales - CRM Opportunity Partner   Sales - CRM Opportunity Resource   Sales - CRM Opportunity Sales Stage Snapshot   Sales - CRM Opportunity Territory   Sales - CRM Partner Business Plan   Sales - CRM Partner Relationship   Sales - CRM Pipeline   Sales - CRM Quota Management   Sales - CRM Resource Territory   Sales - CRM Sales Account Assessments   Sales - CRM Sales Account Resource   Sales - CRM Sales Account Territory   Sales - CRM Sales Activity   Sales - CRM Territory Resource   Sales - Customer Activity   Sales - Inventory and Backlog   Sales - Invoice Lines   Sales - Order Holds   Sales - Order Lines   Sales - Order Process   Sales - Orders and Invoices   Sales - Orders, Backlog and Invoices   Sales - Pick Lines   Sales - Sales Overview   Sales - Sales Receivables   Sales - Sales Revenue   Sales - Schedule Lines   Sales Predictor Output   Sales Prospector Dashboard   Service - CRM Service Request Messages Real Time   Service - CRM Service Request Resource Real Time   Service - CRM Service Requests Real Time   Shipping Real Time   Sourcing - Award   Sourcing - Negotiation   Sourcing - Overview   Sourcing - Response   Sourcing - Supplier Awards Real Time   Sourcing - Supplier Negotiations Real Time   Sourcing - Supplier Responses Real Time   Subledger Accounting - Journals Real Time   Subledger Accounting - Payables Summary Reconciliation Real Time   Subledger Accounting - Receivables Summary Reconciliation Real Time   Subledger Accounting - Supporting References Real Time   Supplier - Supplier Real Time   Supplier Import - Supplier Real Time   Supplier Performance - Supplier AP Transactions   Supplier Performance - Supplier Performance   Supplier Qualification - Qualifications and Assessments Real Time   Supplier Qualification - Question Responses Real Time   Supplier Registration - Real Time   Territory Management - CRM Forecast   Territory Management - CRM Leads   Territory Management - CRM Pipeline   Territory Management - CRM Quota   Territory Management - CRM Sales Accounts   Workforce Career Development - Development Goal Overview Real Time   Workforce Goals - Goal Alignments Real Time   Workforce Goals - Goal Status Overview Real Time   Workforce Goals - Goal Tasks Real Time   Workforce Goals - Target Outcomes Real Time   Workforce Learning - Learning Management Real Time   Workforce Management - Absence Real Time   Workforce Management - Accrual Real Time   Workforce Management - Checklist Real Time   Workforce Management - Documents of Record Real Time   Workforce Management - Employment Contract Real Time   Workforce Management - Grade Rate Real Time   Workforce Management - Historical Processed Time Cards Real Time   Workforce Management - Historical Reported Time Cards Real Time   Workforce Management - Person Real Time   Workforce Management - Planned Schedules Real Time   Workforce Management - Position Real Time   Workforce Management - Processed Time Cards Real Time   Workforce Management - Published Schedules Real Time   Workforce Management - Reported Time Cards Real Time   Workforce Management - Scheduler Profiles Real Time   Workforce Management - Vacancy Real Time   Workforce Management - Work Relationship Real Time   Workforce Management - Worker Assignment Event Real Time   Workforce Management - Worker Assignment Real Time   Workforce Management - Workforce Trend Real Time   Workforce Performance - Performance Document Eligibility Real Time   Workforce Performance - Performance Document Status Real Time   Workforce Performance - Performance Rating Distribution Real Time   Workforce Performance - Performance Rating Real Time   Workforce Performance - Performance Task Status Real Time   Workforce Profiles - Library Objects Real Time   Workforce Profiles - Model Profile Real Time   Workforce Profiles - Person Profile Real Time   Workforce Succession Management - Incumbent Plans Real Time   Workforce Succession Management - Job Plans Real Time   Workforce Succession Management - Plan Candidates Real Time   Workforce Succession Management - Position Plans Real Time   Workforce Succession Management - Talent Pool Review - Talent

429
And that is FANTASTIC

Marketing - CRM B2B Customers   Marketing - CRM B2C Customers   Marketing - CRM Campaign Launch   Marketing - CRM Campaign Performance   Marketing - CRM Campaigns and Contacts Real Time   Marketing - CRM Campaigns and Leads Real Time   Marketing - CRM Campaigns and Opportunities Real Time   Marketing - CRM Lead to Order   Marketing - CRM Leads and Opportunities Real Time   Marketing - CRM Leads Real Time   Marketing - CRM Leads   Partners - CRM Leads and Opportunities Real Time   Partners - CRM Opportunities and Products Real Time   Partners - CRM Partner Classification   Partners - CRM Partner Contact   Partners - CRM Partner Overview   Partners - CRM Partner Programs   Partners - CRM Partner Resource   Partners - CRM Partner Territory   Partners - CRM Partners and Products Real Time   Partners - CRM Registered Leads Real Time   Sales - CRM Account Relationship   Sales - CRM Activity Contact   Sales - CRM Activity Objective   Sales - CRM Activity Resource   Sales - CRM Asset   Sales - CRM Business Plan Objective Split   Sales - CRM Contact Note   Sales - CRM Contact Relationship   Sales - CRM Contact Resource   Sales - CRM Contacts   Sales - CRM Customer Classification   Sales - CRM Customer Note   Sales - CRM Customer Overview   Sales - CRM Customers and Contacts Real Time   Sales - CRM Deal Registration Product   Sales - CRM Deal Registration   Sales - CRM Forecasting and Pipeline Revenue Real Time   Sales - CRM Forecasting   Sales - CRM Historical Forecasting   Sales - CRM Historical Pipeline   Sales - CRM Lead Contact   Sales - CRM Lead Product   Sales - CRM Lead Resource   Sales - CRM Lead Territory   Sales - CRM MDF Budget   Sales - CRM MDF Claim Settlement   Sales - CRM MDF Claim   Sales - CRM MDF Request   Sales - CRM Opportunities and Products Real Time   Sales - CRM Opportunity Assessments   Sales - CRM Opportunity Campaign   Sales - CRM Opportunity Contact   Sales - CRM Opportunity Partner   Sales - CRM Opportunity Resource   Sales - CRM Opportunity Stage Snapshot   Sales - CRM Opportunity Territory   Sales - CRM Partner Business Plan   Sales - CRM Partner Relationship   Sales - CRM Pipeline   Sales - CRM Quota Management   Sales - CRM Resource Territory   Sales - CRM Sales Account Assessments   Sales - CRM Sales Account Resource   Sales - CRM Sales Account Territory   Sales - CRM Sales Activity   Sales - CRM Territory Resource   Sales - CRM Customer Activity   Sales - Inventory and Backlog   Sales - Invoice Lines   Sales - Order Holds   Sales - Order Lines   Sales - Order Process   Sales - Orders and Invoices   Sales - Orders, Backlog and Invoices   Sales - Pick Lines   Sales - Sales Overview   Sales - Sales Receivables   Sales - Sales Revenue   Sales - Schedule Lines   Sales Predictor Output   Sales Prospector Dashboard   Service - CRM Service Request Messages Real Time   Service - CRM Service Request Resource Real Time   Service - CRM Service Requests Real Time   Territory Management - CRM Forecast   Territory Management - CRM Leads   Territory Management - CRM Pipeline   Territory Management - CRM Quota   Territory Management - CRM Sales Accounts

90
Engagement Cloud
(Sales + Service + PRM + Contracts + SPM)

Sales - CRM Account Relationship   Sales - CRM Activity Contact   Sales - CRM Activity Objective   Sales - CRM Activity Resource   Sales - CRM Asset   Sales - CRM Business Plan Objective Split   Sales - CRM Contact Note   Sales - CRM Contact Relationship   Sales - CRM Contact Resource   Sales - CRM Contacts   Sales - CRM Customer Classification   Sales - CRM Customer Note   Sales - CRM Customer Overview   Sales - CRM Customers and Contacts Real Time   Sales - CRM Deal Registration Product   Sales - CRM Deal Registration   Sales - CRM Forecasting and Pipeline Revenue Real Time   Sales - CRM Forecasting   Sales - CRM Historical Forecasting   Sales - CRM Historical Pipeline   Sales - CRM Lead Contact   Sales - CRM Lead Product   Sales - CRM Lead Resource   Sales - CRM Lead Territory   Sales - CRM MDF Budget   Sales - CRM MDF Claim Settlement   Sales - CRM MDF Claim   Sales - CRM MDF Request   Sales - CRM Opportunities and Products Real Time   Sales - CRM Opportunity Assessments   Sales - CRM Opportunity Campaign   Sales - CRM Opportunity Contact   Sales - CRM Opportunity Partner   Sales - CRM Opportunity Resource   Sales - CRM Opportunity Sales Stage Snapshot   Sales - CRM Opportunity Territory   Sales - CRM Partner Business Plan   Sales - CRM Partner Relationship   Sales - CRM Pipeline   Sales - CRM Quota Management   Sales - CRM Resource Territory   Sales - CRM Sales Account Assessments   Sales - CRM Sales Account Resource   Sales - CRM Sales Account Territory   Sales - CRM Sales Activity   Sales - CRM Territory Resource

45
Sales

Solving Real-World Problems with Sales Cloud Analytics

Choose which subject areas to work with

- Hide subject areas you do not need
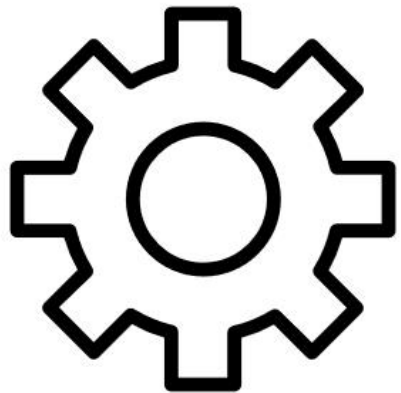
- Create custom subject areas

ORACLE®
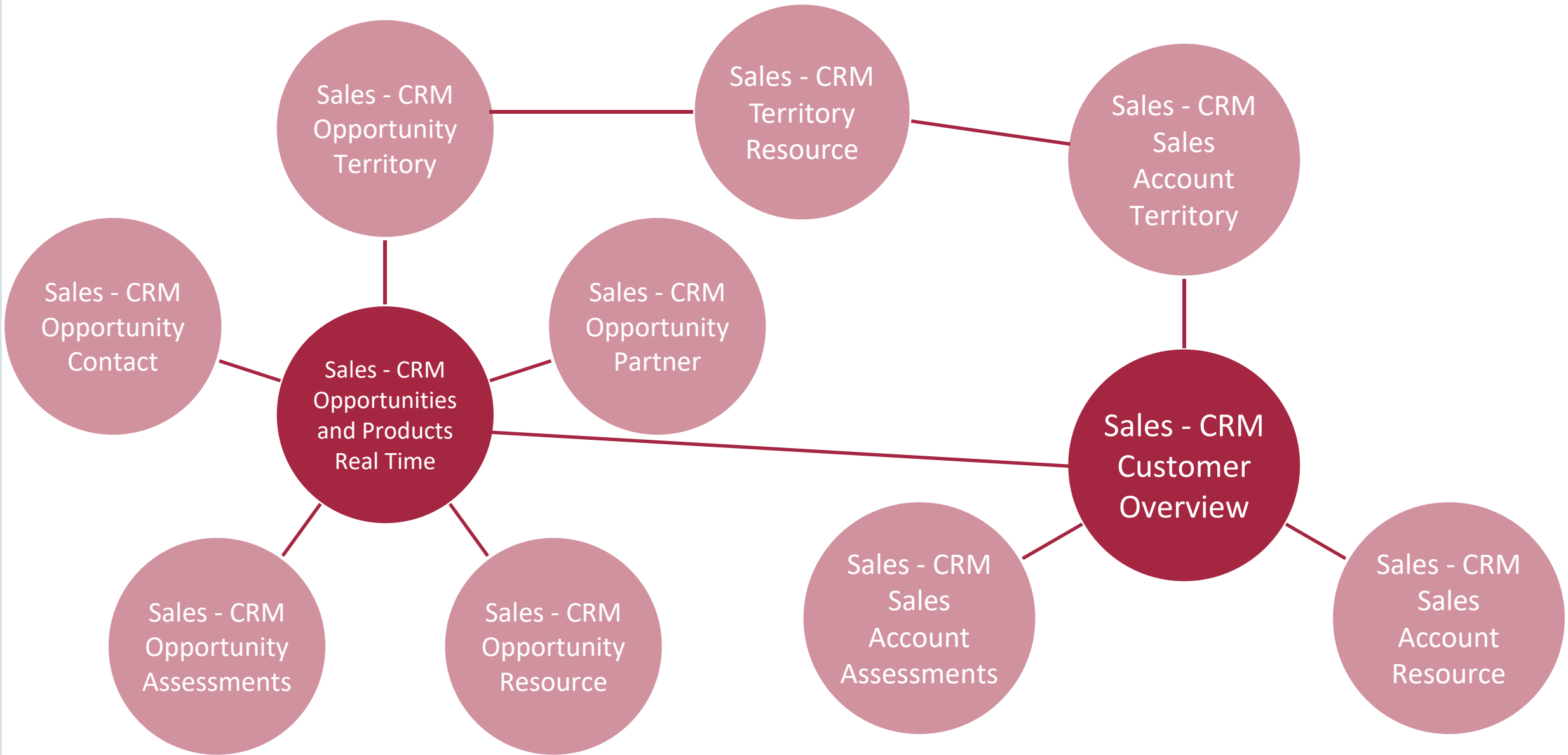
Solving Real-World Problems with Sales Cloud Analytics

Use **(multiple) subject areas in Sales Cloud**
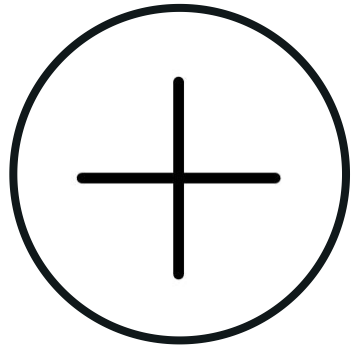
- Adding Subject Areas
  – Related Subject Areas
  – Adding Columns
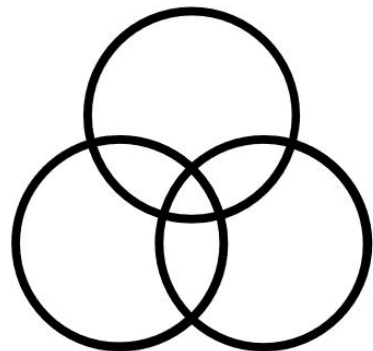
- Combining Subject Areas
  – Unrelated Subject Areas
  – Union / Union All / Minus / Restict
  – Adding Rows

Solving Real-World Problems with Sales Cloud Analytics

Lifecycle of a report

Design

Build

Use

Not all needed data
is available in Sales Cloud

Cannot find
the right data in Sales Cloud

My reports
are not being used

ORACLE®

Solving Real-World Problems with Sales Cloud Analytics

Not credible reports

- Understand the business requirements
- Find the right data
- Use the best possible visualization
- Apply a **consistent styling**

Cannot find reports

- Infolets
- Dashboards
- List Tabs
- Detail Tabs
- Analytics
- Mobile
- Smartview

Solving Real-World Problems with Sales Cloud Analytics

Choose a Standard Layout
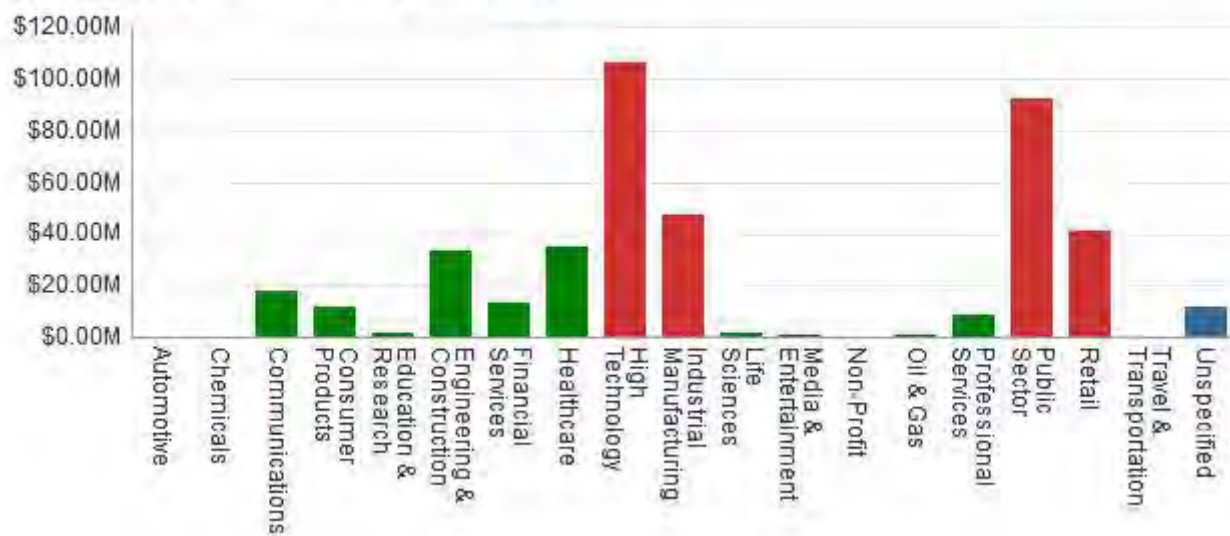
Solving Real-World Problems with Sales Cloud Analytics

Add Introduction Text

Lead & Opportunity Revenue
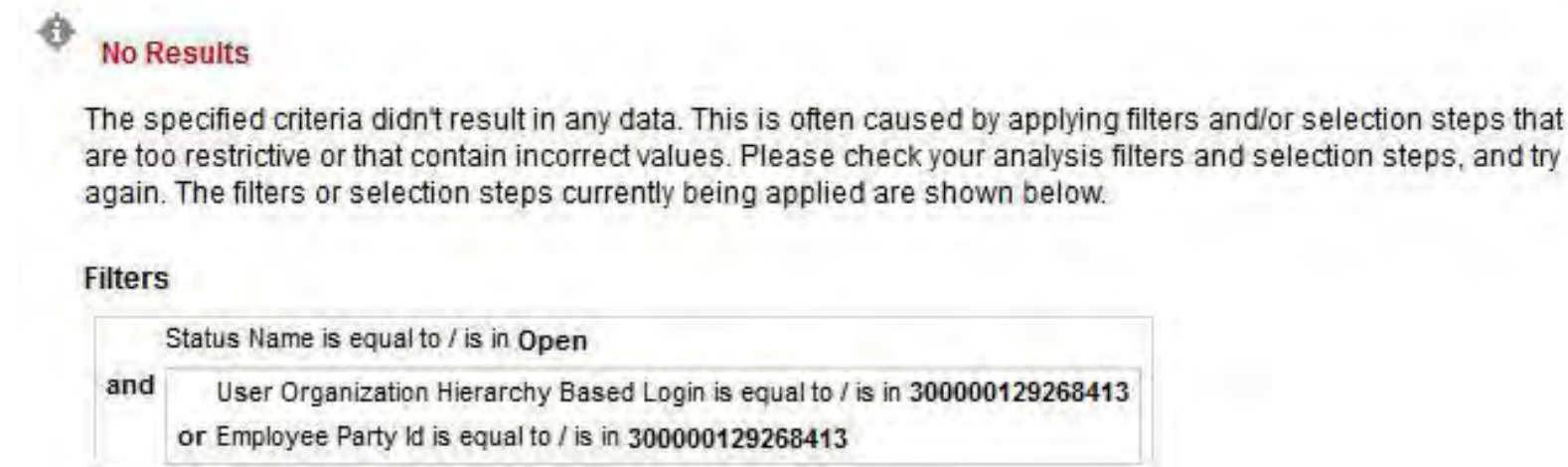
Sales Stage	Pipeline Revenue
00 - Qualified Leads	$280,524,969.3
01 - Qualification	$45,561,103.23
02 - Discovery	$20,875,359.87
03 - Building Vision	$76,583,863.94
04 - Presentation	$106,371,347.60
05 - Agreement	$47,315,596.46
06 - Negotiation	$40,915,037.76
Grand Total	**$618,147,278.21**

> This table shows the 'complete' pipeline combining the open revenue per sales stage with the potential revenue from all qualified leads

The table above shows the 'complete' pipeline combining the open revenue per sales stage with the potential revenue from all qualified leads

Solving Real-World Problems with Sales Cloud Analytics

Add No Results Layout

No Results

The specified criteria didn't result in any data. This is often caused by applying filters and/or selection steps that are too restrictive or that contain incorrect values. Please check your analysis filters and selection steps, and try again. The filters or selection steps currently being applied are shown below.

Filters

	Status Name is equal to / is in **Open**
and	User Organization Hierarchy Based Login is equal to / is in **300000129268413** or Employee Party Id is equal to / is in **300000129268413**

OR

No Results

You and your team do not have any open opportunities at this moment in time. You might want to consider another job :-) JUST KIDDING

ORACLE®

Solving Real-World Problems with Sales Cloud Analytics

Add Conditional Formatting

Closed Opptortunity Revenue by Year

Year	Closed Opportunity Revenue	% Difference to Prev Year
2012	$170,893,169	
2013	$6,150,000	-96% ▼
2015	$188,122,699	2959% ▲
2016	$227,076,877	21% ▲
2017	$638,991	-100% ▼

Solving Real-World Problems with Sales Cloud Analytics

Add Totals & Performance Tiles

Lead & Opportunity Revenue

$618.15M

Total Pipeline Revenue

Sales Stage	Pipeline Revenue
00 - Qualified Leads	$280,524,969.35
01 - Qualification	$45,561,103.23
02 - Discovery	$20,875,359.87
03 - Building Vision	$76,583,863.94
04 - Presentation	$106,371,347.60
05 - Agreement	$47,315,596.46
06 - Negotiation	$40,915,037.76
Grand Total	$618,147,278.21

Solving Real-World Problems with Sales Cloud Analytics

Make reports Actionable

Solving Real-World Problems with Sales Cloud Analytics

Add Navigation Paths

Solving Real-World Problems with Sales Cloud Analytics

Infolets

- Sales Infolets

- Service Infolets

- Infolet Repository
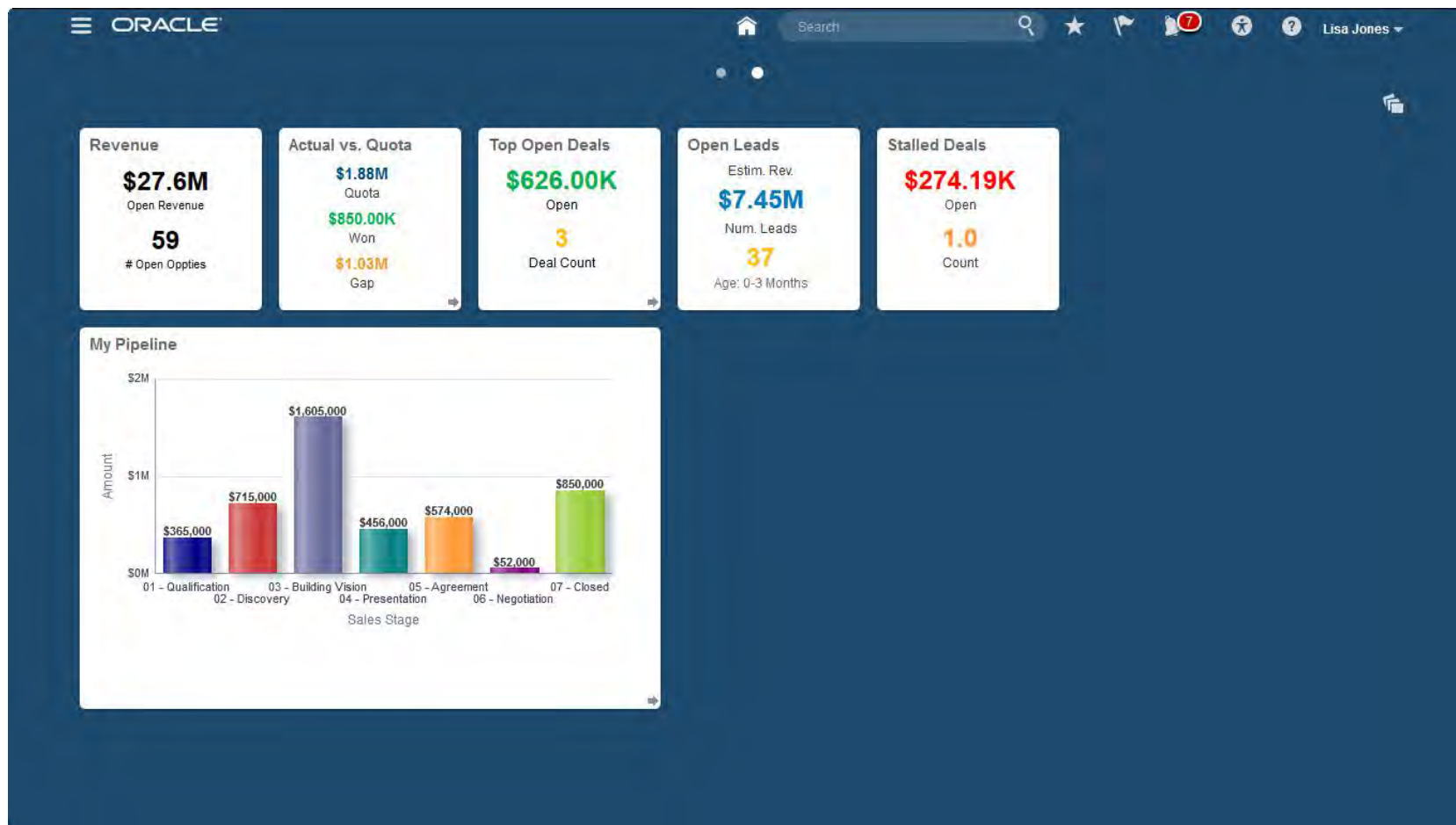
Solving Real-World Problems with Sales Cloud Analytics

Dashboards
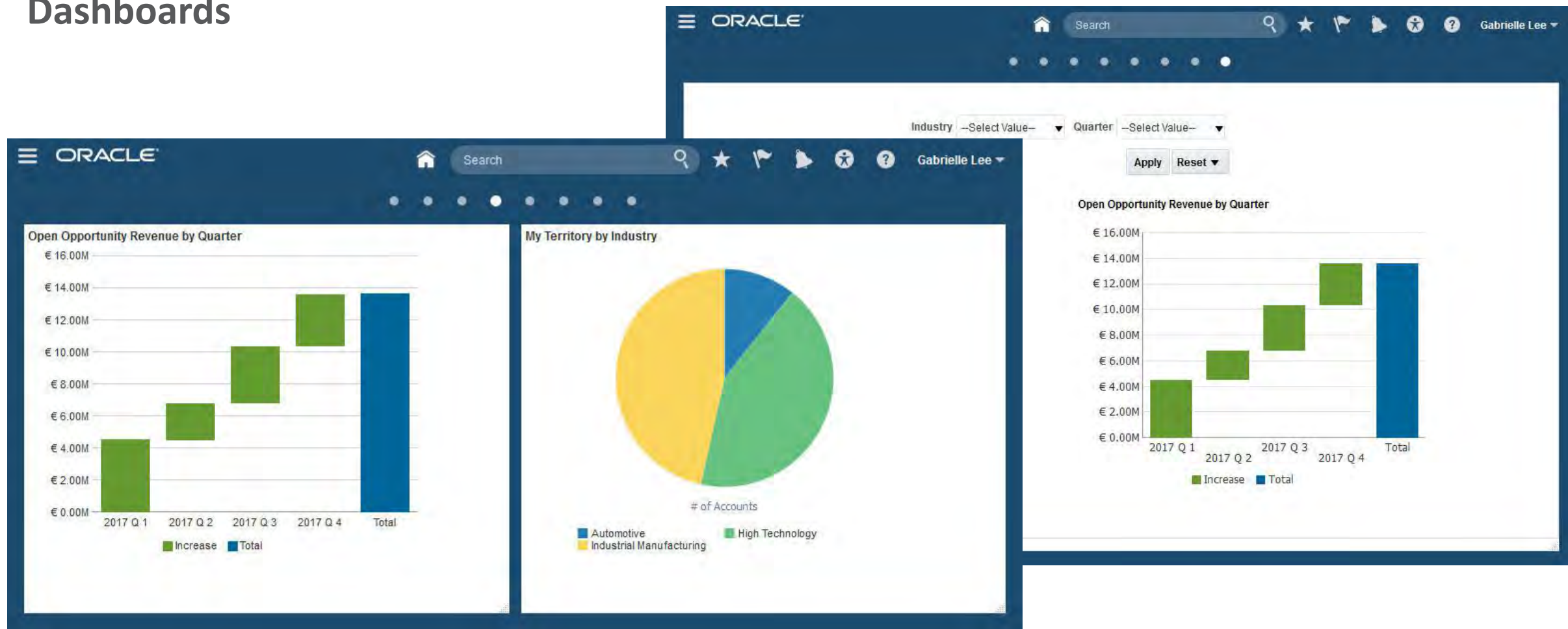
Solving Real-World Problems with Sales Cloud Analytics

List Side Tabs

Solving Real-World Problems with Sales Cloud Analytics

Detail Side Tabs

Solving Real-World Problems with Sales Cloud Analytics

Analytics
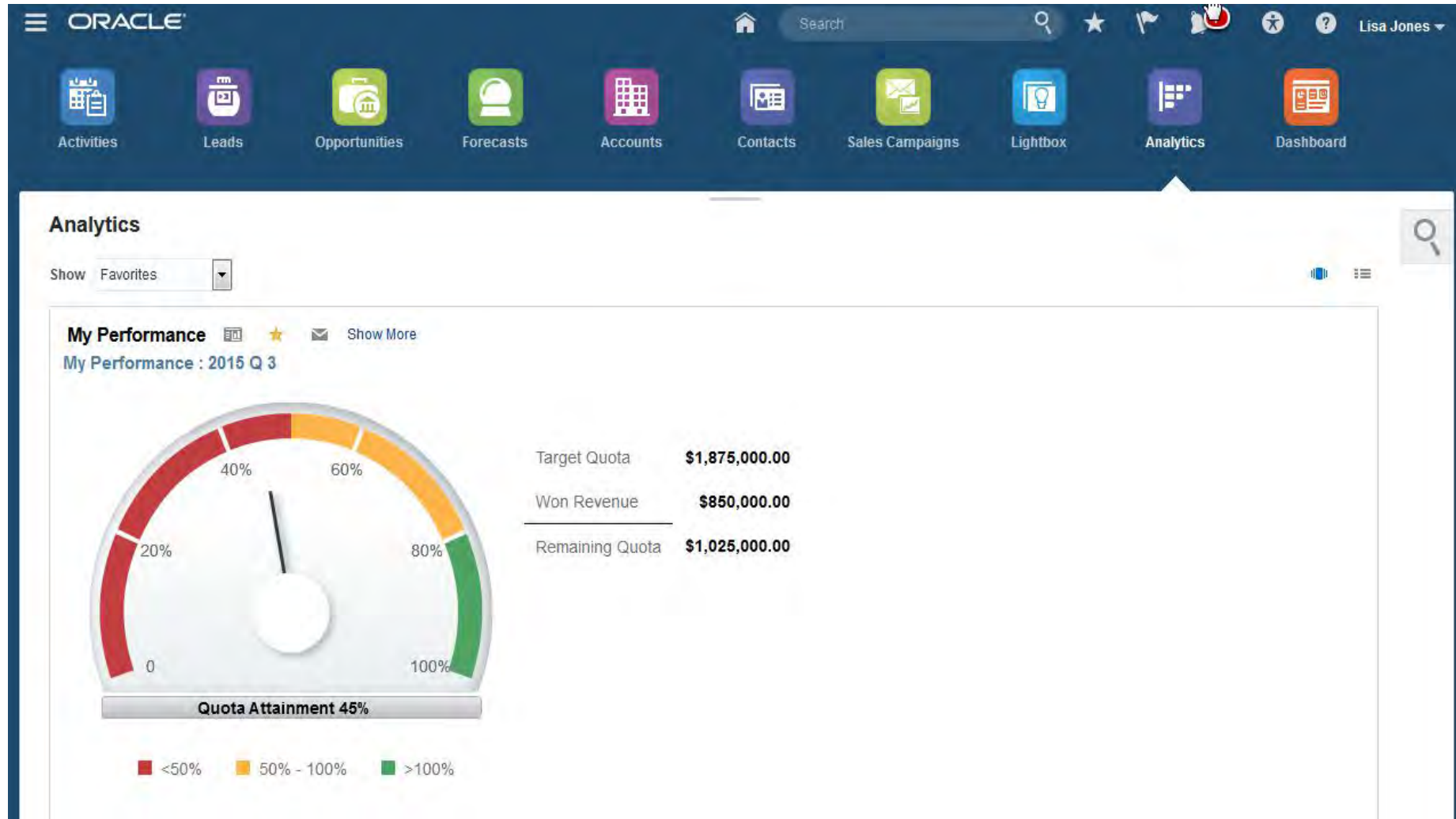
Solving Real-World Problems with Sales Cloud Analytics

Oracle BI Mobile HD

Solving Real-World Problems with Sales Cloud Analytics

Smartview

- Use BI data

- Use desktop tools to format

- Refresh Data available
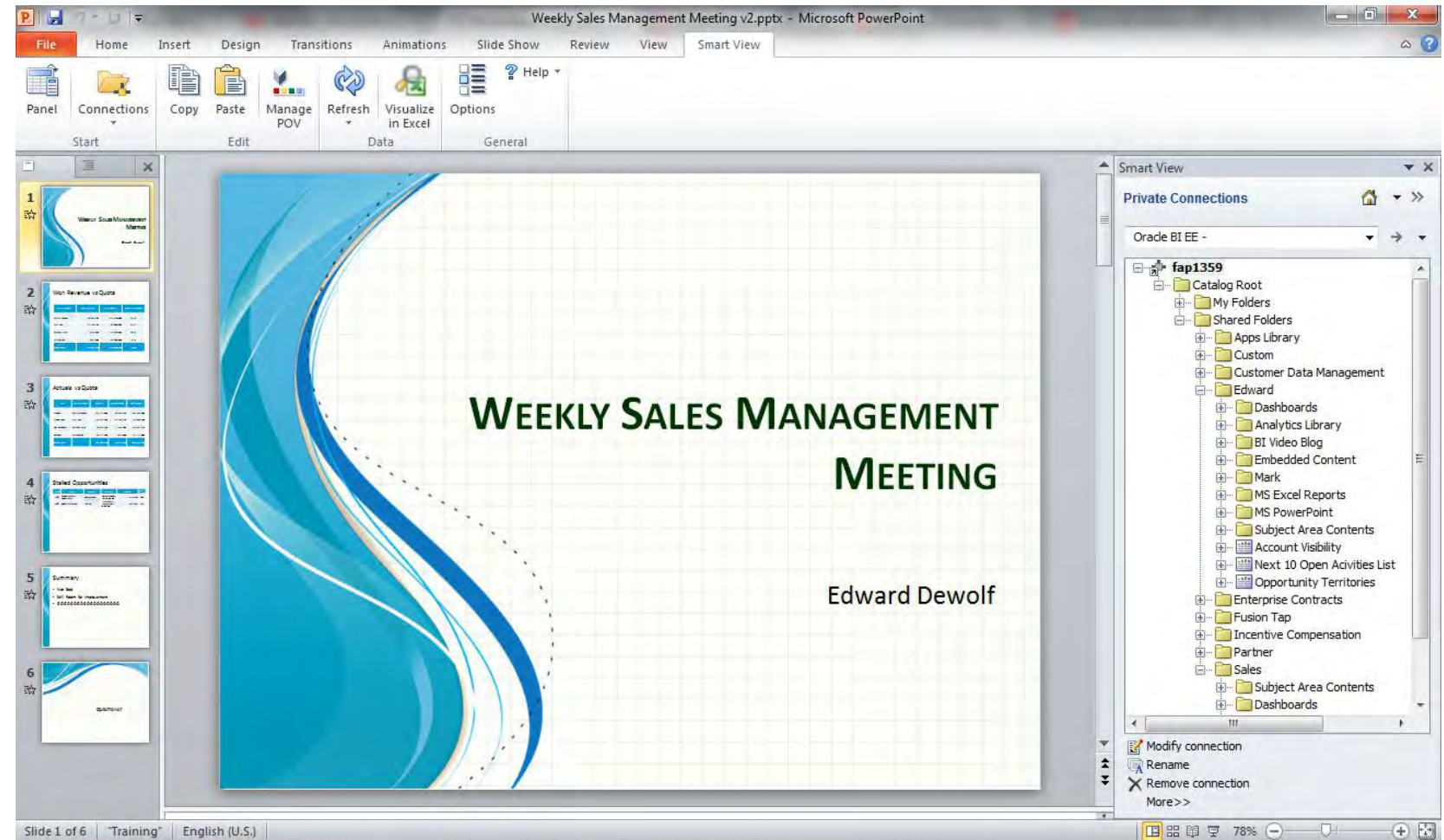
"It is very frustrating to know that anything is possible"

— Cristina Bugu, CX Sales Consultant

ORACLE®

Appendix

- DVCS & Delivers to Cache data

- DVCS Cross area reporting

- Publisher not for physical queries

ORACLE®