

data sheet

ORACLE DAILY BUSINESS INTELLIGENCE FOR QUOTING

Oracle® Daily Business Intelligence (DBI) for Quoting is a management reporting solution for sales managers to enable world class analysis on general quote management, discount impact, quote conversion performance, and approval process efficiency for their organization. DBI for Quoting is part of the Oracle® E-Business Suite, an integrated set of applications, which is designed to transform your business into an e-business.

Optimize the Quote-to-Order Process for Your Business

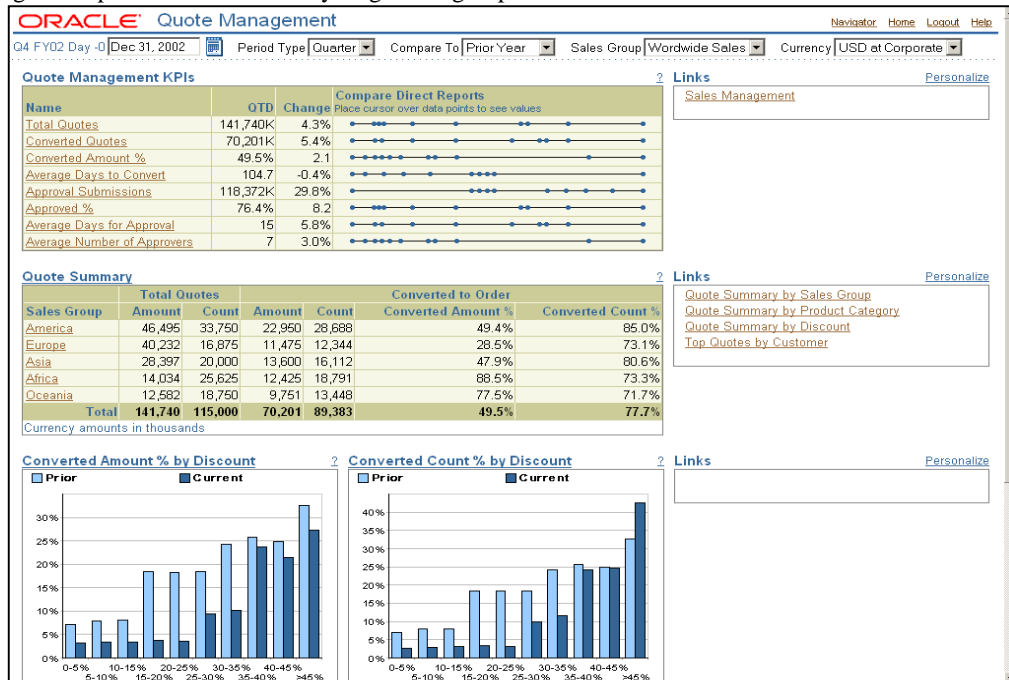
Oracle DBI for Quoting provides a comprehensive set of analytics that allow you to optimize the quote-to-order process. Measurements and reports are updated daily to provide the most recent quote-focused analysis of an enterprise's business. The term 'daily' in Daily Business Intelligence describes the advantage of Oracle's solution, timely access to some of the most time-sensitive information within a company..

Oracle DBI for Quoting comprises series of Key Performance Indicators (KPIs), trend graphs, summarized tables, and personalized links presented in an easy to use set of pages. These pages provide analysis such as quote-to-order conversion performance, quote summary breakdown, quote approval review, and discount impact summary. DBI for Quoting is tailored for sales managers who have the direct responsibility to ensure that the quote-to-order process is optimized. Users can analyze the sales force's ability to convert quotes to orders, study the discount impact to quote conversion performance, optimize the approval process, and examine top quotes by key customers. Moreover, Oracle DBI for Quoting offers intuitive trend graphs and a historical comparison capability that allows for easy review of the summarized information.

Daily, Centralized View of Quote-Focused Analytics

In order to efficiently convert quotes to orders, sales managers need to have a comprehensive set of analytics that reveals all the intricacies of the quote-to-order process. It not only needs to be complete (instead of scattering data across various applications), it also needs to be delivered on a daily basis so sales managers can make mission critical decisions when necessary. Oracle DBI for Quoting provides daily, advanced analytics on quote-focused measures to monitor the entire process and identify key bottlenecks (Figure 1).

The capability to view daily summarizations ensures that sales managers will know at the beginning of each day exactly how the sales organization is performing in terms of quote conversion. Daily summarization enables sales managers to spend minutes – not days – gathering important information about the business.



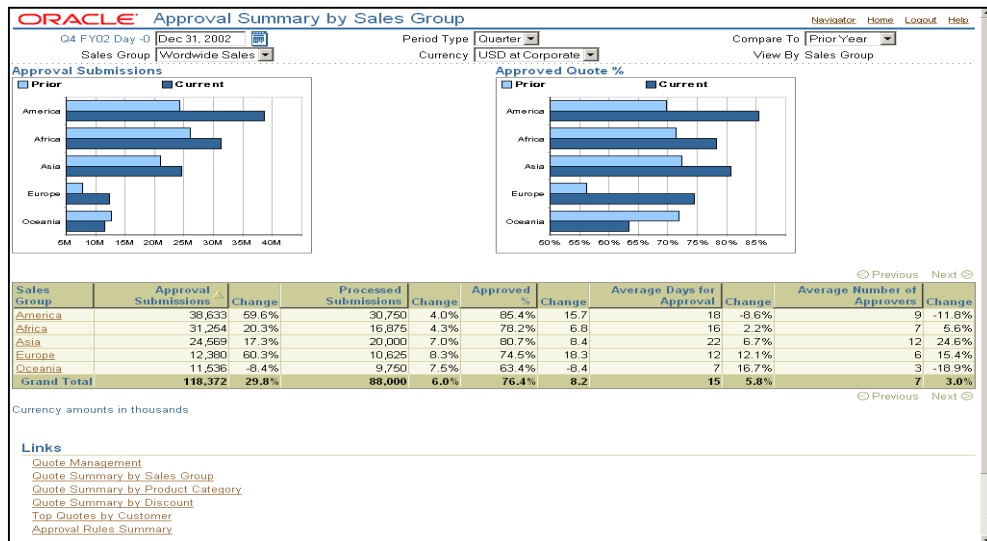
(Figure 1) The Quote Management Page provides sales managers quote-focused analytics including total quotes, converted quotes performance, approval efficiency, and impact of discounts.

Oracle DBI for Quoting provides the needed insight for sales managers to administer the quote-to-order process through a simple to use web interface with presents:

- Key Performance Indicators that provide quote-focused analysis such as total quotes, converted quotes, average days to convert, approval %, and average days for approval. Additionally, it contains sales group comparison indicators to show the performance of the sales manager’s direct reports relative to one another.
- Pre-built comparative analysis reports. Comparisons can be done across many dimensions such as:
 - Compare present period’s performance with last period or same period last year
 - Organizational comparisons across the enterprise in both functional and global currencies
 - Trend data over periods of weekly, monthly, quarterly or yearly
 - View period-to-date results for any day or time period in the past

Understand and Improve the Quote Approval Process

Approving quotes can be time consuming because this process is often handled manually. Often, there are layers of approval procedures which can cause unnecessary delays. While Oracle Quoting, the underlying quote management application behind DBI for Quoting, eliminates the difficulty of gathering and tracking manual approvals, there is still a need for in-depth analytics that can identify bottlenecks in the process. DBI for Quoting provides both visibility and analysis that enables sales managers to streamline the approval process. This combination of visibility and analysis drives faster quote conversion, higher revenue to business, and greater customer satisfaction.



(Figure 2) The Approval Summary report contains key metrics that identifies bottlenecks in the quote approval process and comparison measures that compare current performance against historical performance

Additionally, Oracle DBI for Quoting comes with a unique set of reports that looks into the efficiency of approval rules. For example, a sales manager can unintentionally set up an approval rule that requires him/her to approve 95% of the quotes. Clearly, this is not efficient and can cause significant impact to the business over time. Without adequate insight into the efficiency of approval rules, sales managers will not be able to understand or address this

type of issue. Oracle DBI for Quoting contains an Approval Rules Summary report (Figure 2) that identifies approval rules that are most and least applied in the approval process. By having this knowledge, sales managers are able to validate existing approval rules for more efficiency.

Analyze the Impact of Discounts on Quote Conversion

How much discount the sales person offers heavily influences the likelihood of a quote converting to an order. The practice of discounting builds customer loyalty and increases customer's propensity to buy. However, without adequate analysis of the impact of discounts, sales managers are not able to understand the true effectiveness of the discount strategy. Additionally, sales managers need to know if they are protecting the underlying margin with discounts offered to customers. Oracle DBI for Quoting provides detailed analysis on the impact of discount. It provides the sales manager with the following:

- Summary tables that break down quote information by measures such as total quote amount, total number of quotes, converted quote amount, and converted quote % by different brackets of discount percentages. Additionally, it contains comparison measures that evaluate the current performance against performance from last period or same period last year.
- Graphs on Converted Amount % by Discount and Converted Count % by Discount show the distribution of converted quotes relative to different discount brackets. Like the summary tables, they contain comparison measures that evaluate the current performance against performance from last period or same period last year.

Moreover, with the ability to drill seamlessly to Order Management and Product Intelligence reports, sales managers are able to discover additional information that would determine if they are protecting the product margin by the discounts offered.

Personalized Related Links

Related links can be customized to all intelligence and applications functions and reports, including tabular and graphical representations of sales data, trends, links to menus, as well as both internet and intranet web pages. By personalizing the DBI for Quoting page, all necessary measurements and reports are provided on a daily basis, and in one location, so the sales managers and executives can make informed decisions.

Deploy Out of the Box

DBI for Quoting is both straightforward and simple to implement. DBI utilizes existing set-ups and terms that have been used in existing Oracle Applications. The result is a streamlined reporting solution that can be used almost immediately to provide an enterprise's *daily measurements*.

Drill Directly to Transactions

DBI for Quoting completes the circle from summarization to granular detail by drilling into the transactions that contributed to the key performance measures. This allows users to identify and view the specific transactions that are behind the aggregation to answer the questions that arise.

Oracle E-Business Suite—The Complete Solution

Oracle E-Business Suite enables companies to efficiently manage quote-to-order process. This information architecture provides a single definition of your customers, employees, and products—all aspects of your business. Whether you implement one module or the entire Suite, Oracle E-Business Suite enables you to share unified information across the enterprise so you can make smarter decisions with better information.

Oracle Corporation
World Headquarters
500 Oracle Parkway
Redwood Shores, CA 94065
USA

Worldwide Inquiries:
650.506.7000
Fax: 650.506.7200
<http://www.oracle.com>

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KEY FEATURES

Comprehensive View of the Quote-to-Order Process

- Analyze total quotes for a particular customer, sales group, or product category
- Monitor quote conversion performance for sales group and product category
- Compare quote conversion performance for current period and prior periods
- Identify process bottlenecks through a complete set of quote approval measures
- Analyze data to measure total quotes, converted quotes, average days to convert, and more

Maximize Sales Force Efficiency

- Compare quote conversion performance across entire sales group hierarchy
- Determine sales groups that has the highest quote-to-order conversion %
- Analyze and improve sales group's total converted quotes and converted amount %
- Identify those that have the longest average days for approval and average days to convert

Daily Summarization and Personalization of Quoting Activity

- Receive daily reports in minutes with daily summarization architecture
- Access intelligence reports and application forms immediately with customized related links

Analyze Discount Impact on Quotes

- Monitor different level of discounts that are offered to customers
- Break down different discount brackets by key quote performance measures and examine their impact to business
- Determine the individual conversion rates with discount for all sales groups and sales representatives

Comparative Analysis

- Observe trends over time periods of weekly, monthly, quarterly or yearly
- Perform comparisons for key quote performance measures
- Compare performance today with the prior period or the same period a year ago

Flexibility to Support Your Business

- Utilize predefined Key Performance Indicators for measuring quote conversion performance
- Leverage security across sales organization
- Collect data from a single instance for a view of purchasing information across the enterprise
- Analyze data from multiple business perspectives using common dimensions

Daily Business Intelligence for Quoting Key Performance Measures

Measures enable you to monitor trends for key objectives

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| <ul style="list-style-type: none">• Total Quotes – The value of all open quotes prior to the start of the current period and all the new quotes created within the current period, to date• Converted Quotes – The value of quotes converted to orders, for the period to date• Converted Amount % - The proportion of total quotes converted to orders, for the period to date• Average Days to Convert – The average number of days required to convert a quote to an order, for the period to date | <ul style="list-style-type: none">• Approval Submissions – The value of all quotes that have been submitted for approval, for the period to date• Approved % – The proportion of all approval submissions that have been approved, for the period to date• Average Days for Approval – The average number of days required to convert a quote to an order, for the period to date• Average Number of Approvers – The average number of approvers required to convert a quote to an order, for the period to date |
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Quoting Reports

Reports enable you analyze the complete quote-to-order process

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| <ul style="list-style-type: none">• Quote Summary by Sales Group – displays total quotes, quotes converted to orders, proportion of total quotes converted and average number of days required to convert a quote to an order, for both quote value and quote count, aggregated by sales group. This information is valuable in monitoring the quote conversion process, enabling corrective action to be taken to reduce cycle times and secure more orders.• Quote Summary by Product Category - displays the total quotes, quotes converted to orders and proportion of total quotes converted, for both quote value and quote count, aggregated by product category. This information is valuable in monitoring the quote conversion process, enabling corrective action to be taken to secure more orders.• Quote Summary by Discount – displays the total quotes, quotes converted to orders and proportion of total quotes converted, for both quote value and quote count, aggregated by the discount range. This report highlights the discount ranges that are most effective in securing orders, thus enabling sales executives and managers in setting discounts that maximize quote conversion. | <ul style="list-style-type: none">• Top Quotes by Customer – displays top open quotes or top quotes converted to order, by customer. The report provides this information by quote value and quote counts for each customer. This information is valuable in monitoring the performance of the sales organization and identifying situations where sales managers or executives may need to intervene, in order to eliminate functional bottlenecks and meet customer satisfaction, leading to increased orders.• Approval Summary by Sales Group – displays the quotes submitted for approval and those processed, by the sales group hierarchy. The information provides a breakdown of the quote conversion process. This information enables sales executives and managers to identify bottlenecks in the approval process and to resolve the issue promptly, leading to a more efficient quote conversion process.• Approval Rules Summary – The Approval Rules Summary allows sales executives and sales managers to analyze approval rules that are most applied in the approval process. This information provides an overview of the types of approvals that are most and least frequently requested. This can then be used to streamline approval processes in order to enhance the business flows and processes of the organization, leading to greater efficiency in the quote approvals process. |
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