

CX Sales Redwood Analytics

Visualization Configuration
Express Reporting Tool
Sales Dashboard

Introduction



Piyush Jain

Principal Product Manager

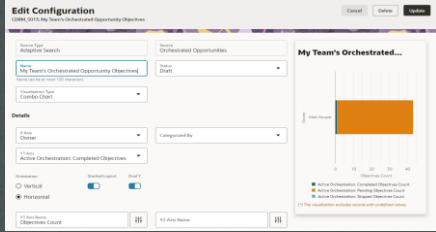
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Agenda

- **Introduction**
- **Visualization Configuration**
 - Lab
 - Development & Support
- **Express Reporting Tool**
 - Lab
 - Development & Support
- **Sales & Service Dashboard**
 - Lab
 - Development & Support

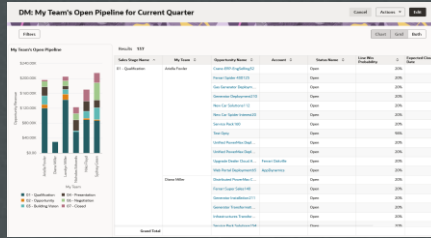


Redwood Sales Analytics Suite



Visualization Configuration

- Built for Sales Administrators to create advanced visualizations based on OTBI & Adaptive Search
- Visualizations can be added to the Sales Dashboard



Express Reports

- Easy and intuitive tool for sales teams to build their own reports, explore sales data, create visualizations, and share them
- Visualizations can be added to the Sales Dashboard



Oracle Analytics Cloud

- Seamlessly integrate data from various sources & create unified view of the data landscape.
- Advanced Predictive Analytics with Custom Models.

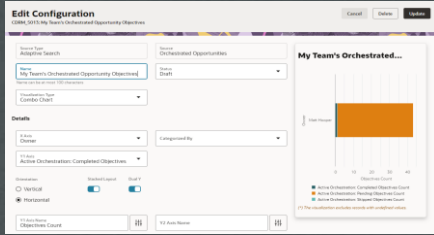


Sales Dashboard

- One stop portal to showcase KPI's, trends and visualizations to sales teams
- Take Smart Actions directly from the dashboard
- Global Search & Global Filters

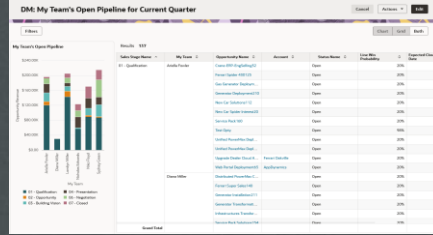


Redwood Sales Analytics Suite



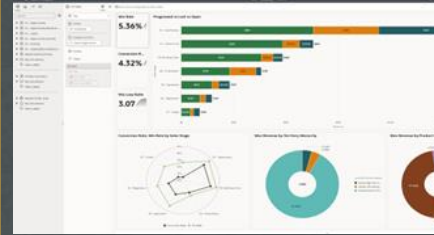
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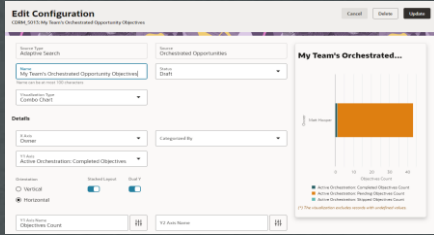


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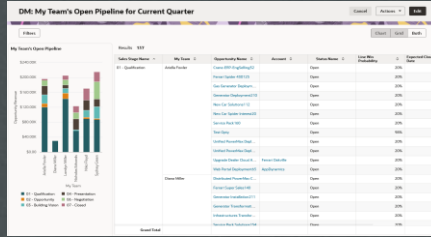


Redwood Sales Analytics Suite



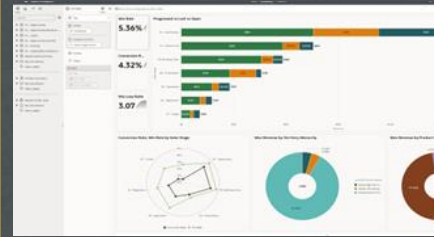
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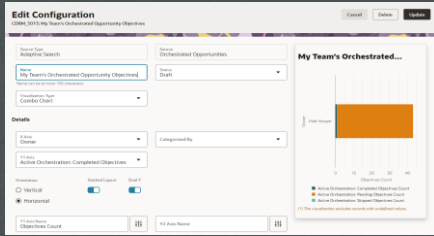


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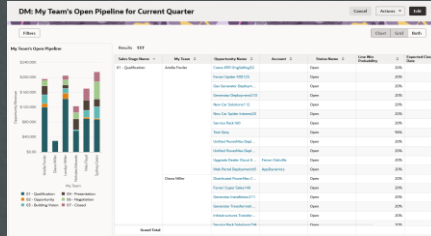


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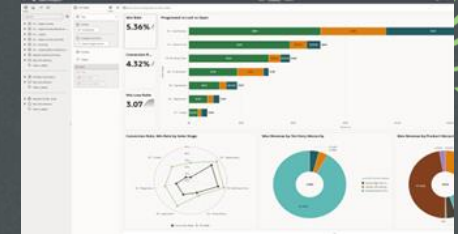
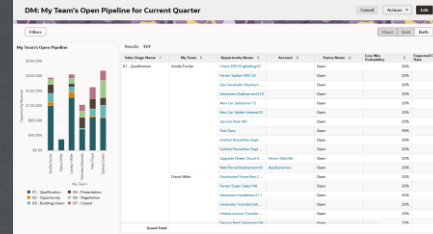
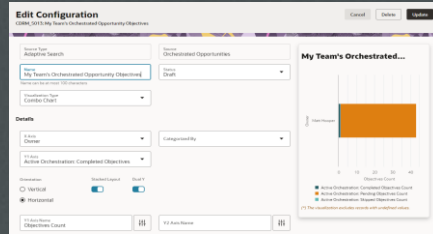


Sales Dashboard

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Analytics Suite – Use Cases



Visualization Configuration

Express Reports

Oracle Analytics Cloud

Target Users

Sales Administrators

Sales Users (Managers, Representatives etc.)

All with license

Data Source

OTBI (Sales, Service), Adaptive

Sales, Service

Any (OTBI + External)

Data

Real-Time

Real-Time

Near Real-Time

Custom Calculations

Yes

No

Yes

Objects

Standard + Custom, Multi-object

Standard + Custom

Standard

AI ML

Limited (Adaptive Search)

No

Advanced (Predictive, Custom Models)



Visualization Configuration Tool

Target Users: Sales Administrators

Visualization Configuration Agenda



- **Overview**
- **Walkthrough**
- **Lab**
 - Create Analysis
 - Create OBTI based Visualization
 - Create Adaptive Search based Visualization
- **Roadmap**
- **Help & Support**
 - Troubleshooting Guide
 - Documentation

Lab 1

- Create an Analysis in Oracle Analytics
 - Open Visualization Configuration Tool
 - Create a Visualization using the Created Analysis
 - Create an Adaptive Search based Visualization
 - Copy the Reference Numbers of both the Visualizations in a Notepad
-
- Troubleshooting & Guides – Refer Document



Visualization Configuration Roadmap

OTBI based

Visualization Types

- Tabular Chart
- Metric Chart

Top 10 Accounts by Expected Revenue

Account Name	Expected Opportunity Revenue
BIQA_PRM Global Enterprise	48,438,742
FAWQA_ACCOUNT1	15,575,628
OTBI New Customer 3	9,145,000
FAWQA_CDRM_ACCOUNT1	7,016,350
BIQA_MA SONY	6,749,689
BIQACP_ALENOX_ACCOUNT1	6,685,224
BIQA_PRM Sharp Enterprise	6,001,462
OBIA Testing	5,100,578
BIQA_PRM Tech Services	5,027,603
BIQACP_RMORRO_ACCOUNT1	2,476,894

Electronics

Critical

\$117k

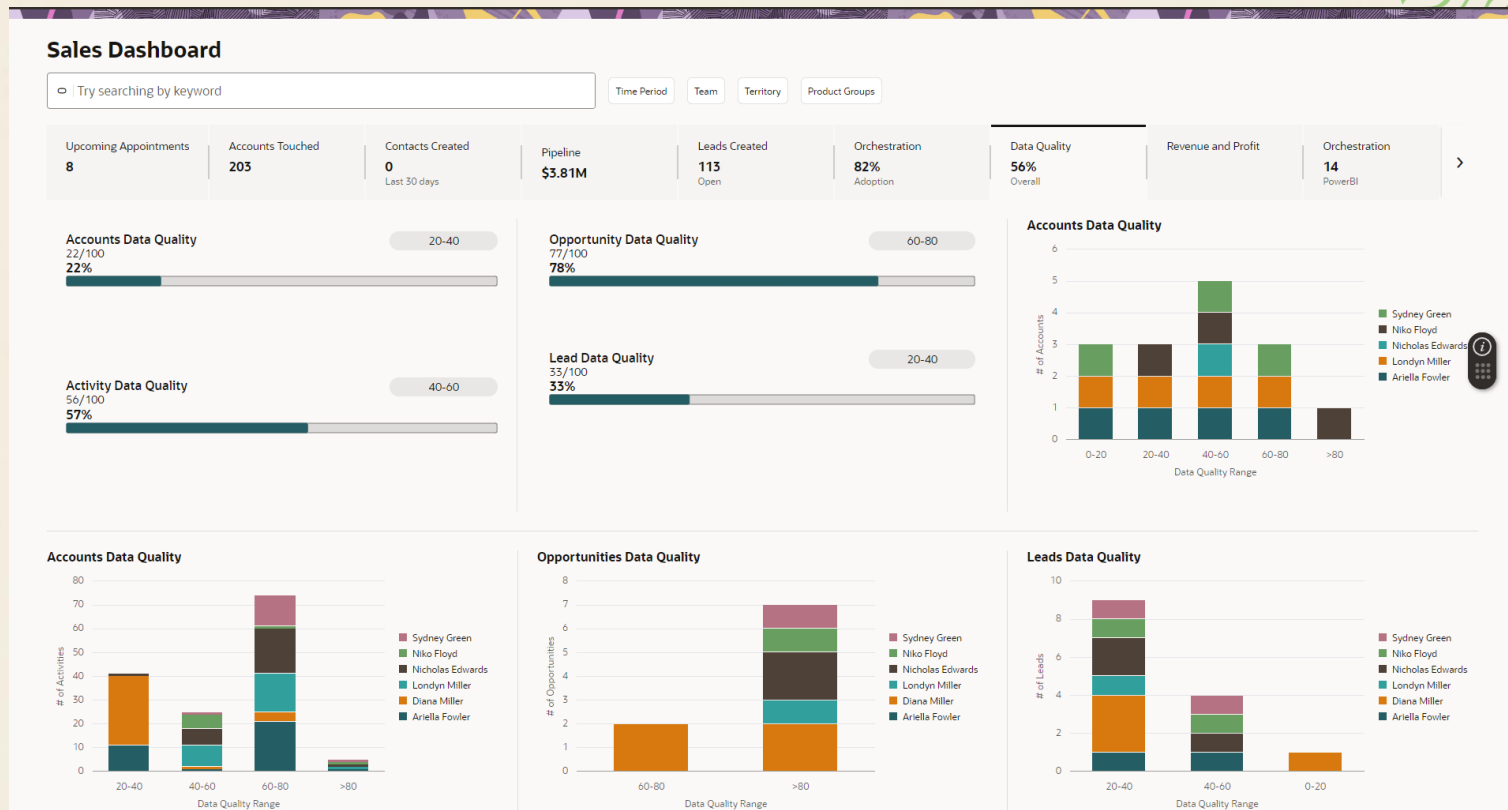
Current month

Visualization Configuration Roadmap

Global Filter
Support for OTBI

Multiple
visualizations from
existing OTBI
analysis

Object based
visualizations



Express Reporting Tool

Target Users: Sales Managers & Sales Representatives

Express Reports Agenda

- **Overview**
- **Walkthrough**
- **Lab**
 - Create Report
 - Preview Report
- **Admin Features**
- **Roadmap**
- **Help & Support**
 - Troubleshooting Guide
 - Documentation



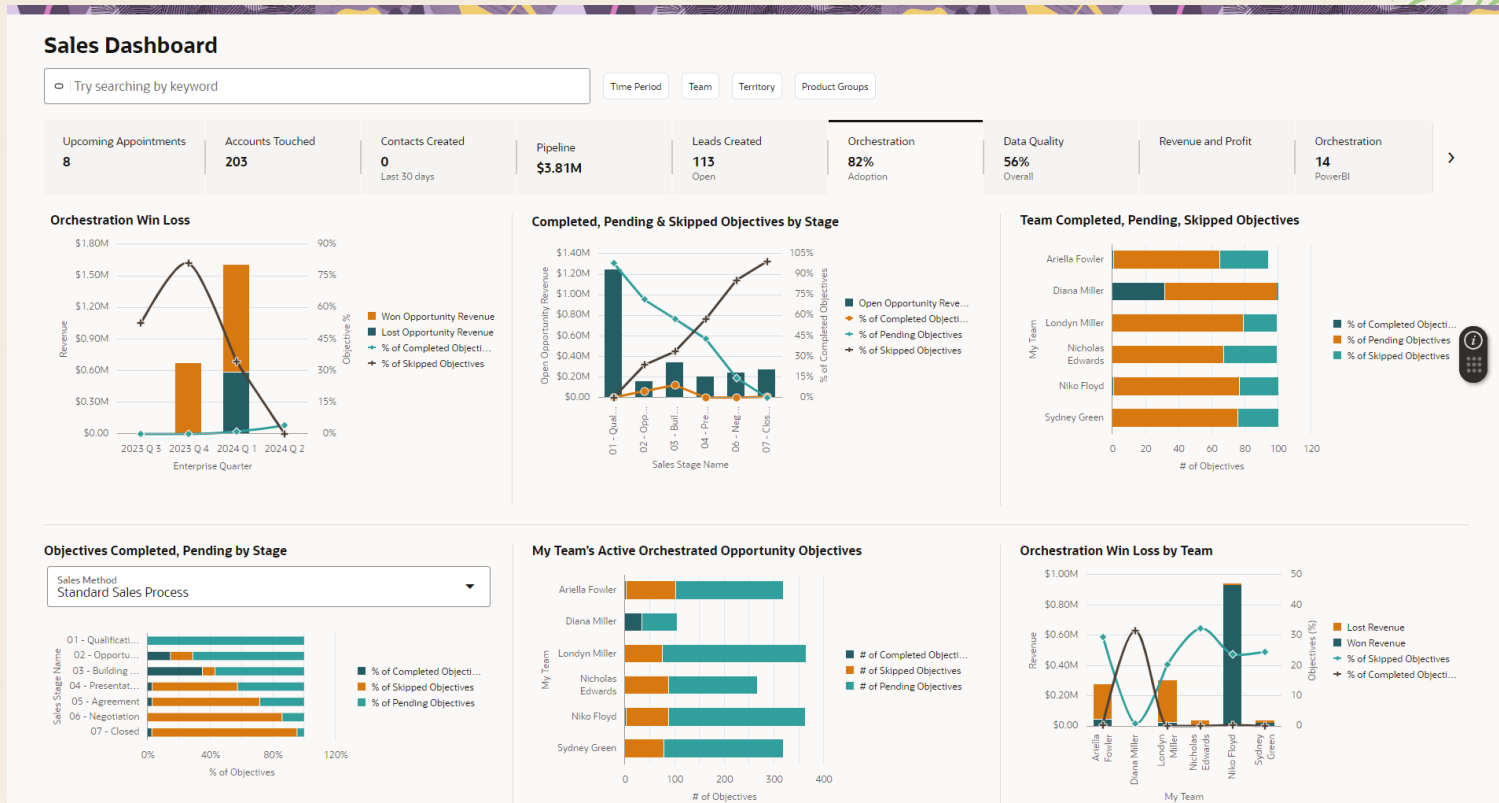
Lab 2

- **Open Express Reports**
- **Click on Create Report & Select a Report Type**
- **Configure Report**
 - Add/Remove Columns
 - Add/Update/Remove Filters & Prompted Filter
 - Add/Remove Group By
- **Add & Configure a Visualization**
- **Preview Report**
 - Export Report
 - Filters
- **Troubleshooting & Guides – Refer Document**



Express Reports Roadmap

Enabled
Orchestration
Based Stats &
Visualizations



Sales Dashboard

Target Users: All Sales Users

Sales Dashboard Agenda

- **Overview**
- **Walkthrough**
- **Lab**
 - Dashboard Settings
 - Add a Metric, List and Table View
 - Add 2 Visualization Configuration Components
 - Add Express Report Component
- **Roadmap**
- **Help & Support**
 - Troubleshooting Guide
 - Documentation
- **Service Dashboard**



Lab 3

- **Open Sales Dashboard**
- **Open Visual Builder Studio for Customization**
 - Dashboard Settings
 - Add a Metric Card
 - Add a List or Table View
 - Add 2 Visualization Configuration Components
 - Add Express Report Component
- **Troubleshooting & Guides – Refer Document**

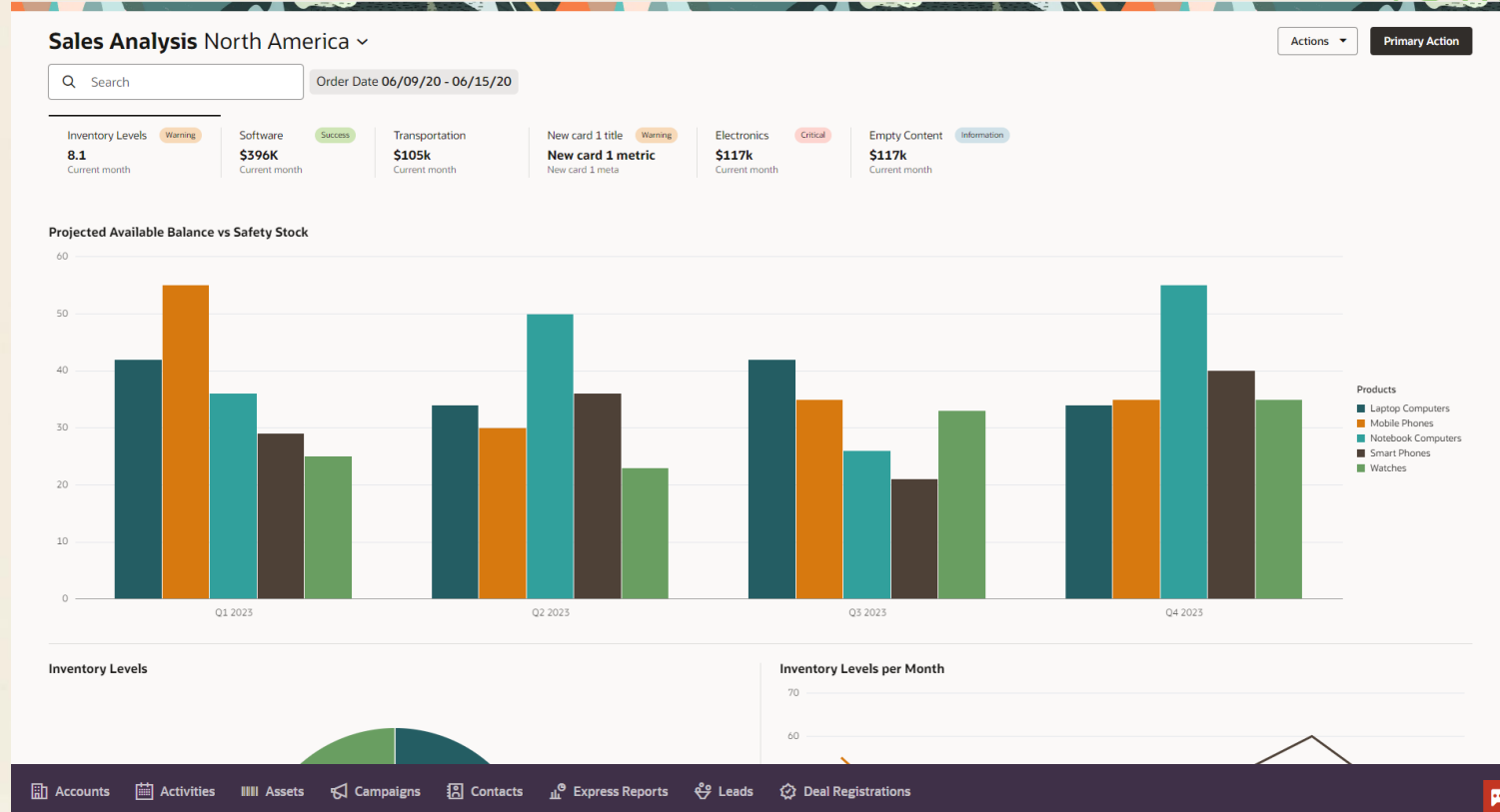
Sales Dashboard Roadmap

Hero Template

- Big Components
- Scroll

Page Title/ Subtitle

Navigation Bar

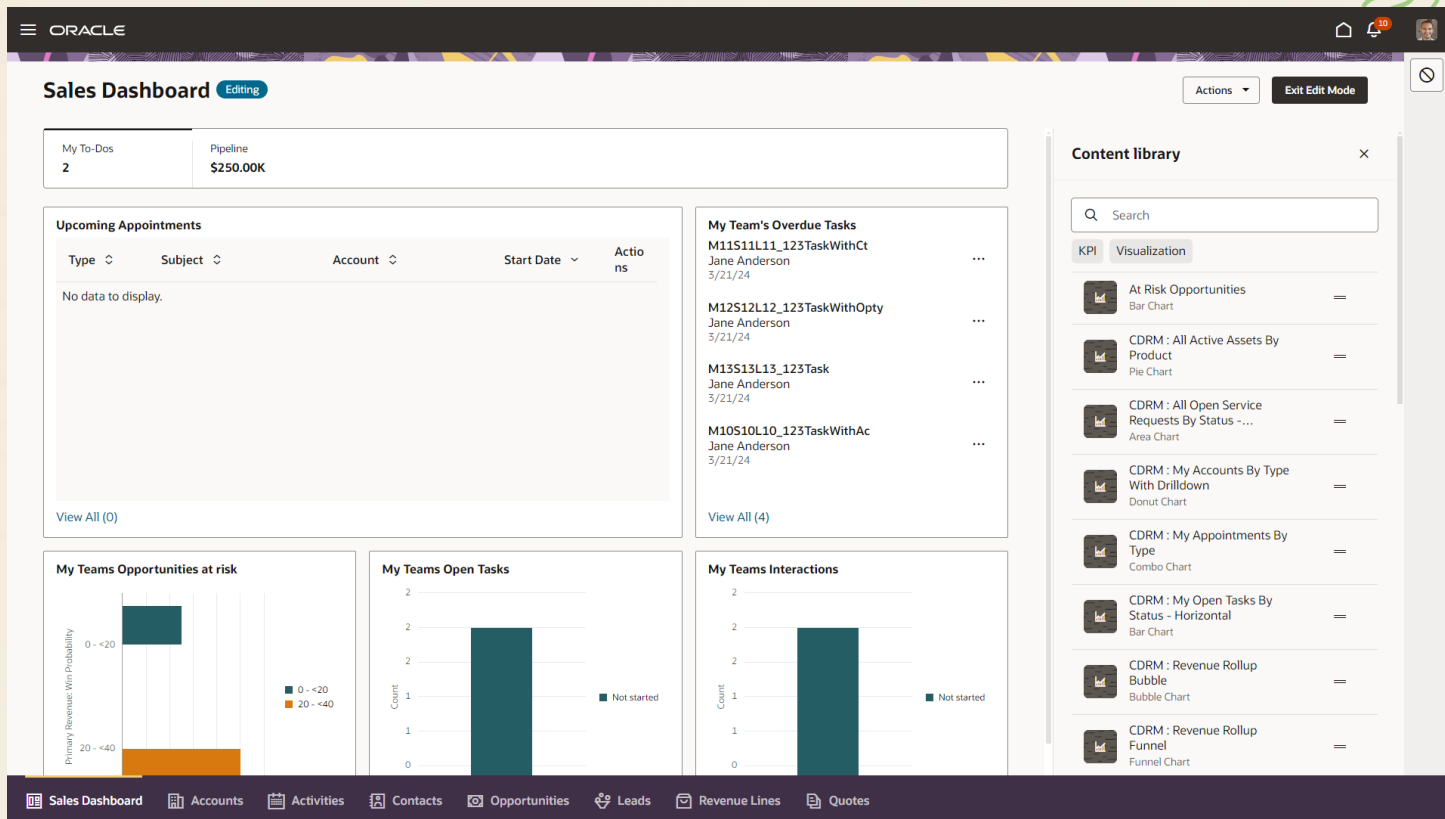


Sales Dashboard Roadmap

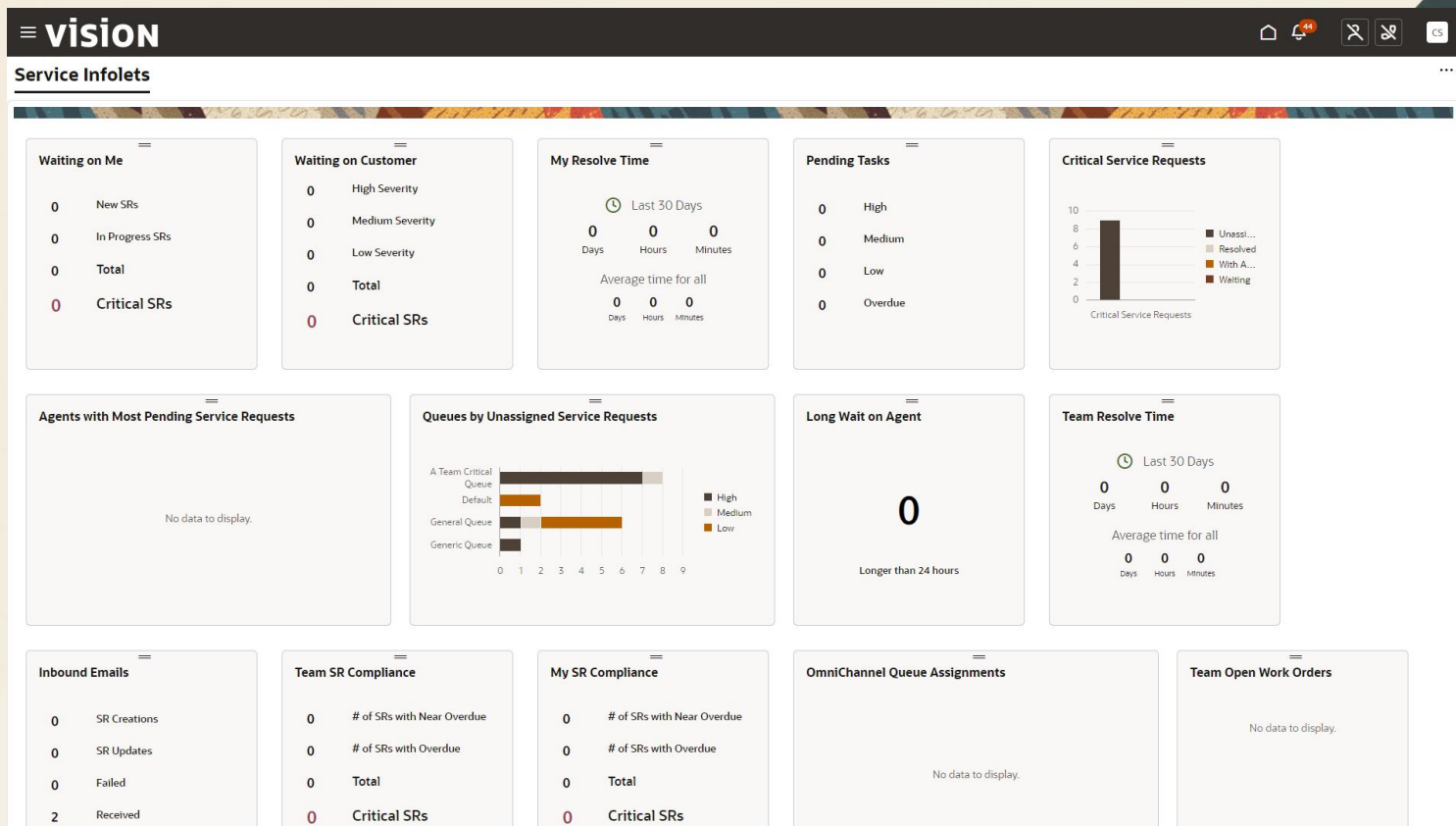
Global Filter

- Product Group

In App Personalization



Service Dashboard





Thankyou

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