Sterling Business Intelligence™

User Guide

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Sterling Commerce
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Contents

Getting Started with Sterling Business Intelligence

Sterling Business Intelligence is an analytical solution that is used to aggregate data across the Sterling applications. It enables you to analyze the data and generate business reports with the help of Cognos reporting tools. Sterling Business Intelligence is a key element of the Sterling Commerce solutions, and enables organizations using the Sterling Commerce solutions to obtain information about their business performance and the key drivers that will help their business grow.

Using the Sterling Business Intelligence solution, you can view the dashboards and reports pertaining to a selected time period. The dashboards and reports help you monitor and understand key business trends.

The following topics are covered in this guide:

✦ Sterling Business Intelligence User Interface
✦ Sterling Business Intelligence Home Page
✦ Sterling Business Intelligence Dashboards and Reports
✦ View the Sterling Business Intelligence Reports and Dashboards
✦ Print Sterling Business Intelligence Reports and Dashboards
✦ Saved Searches
✦ Manage Saved Searches

Intended Audience

This manual is intended to provide assistance to all the users of the Sterling Business Intelligence Application Consoles to perform various tasks.

Sterling Business Intelligence User Interface

This topic describes the layout of Sterling Business Intelligence.

Home Page

Menu Bar   Enterprise Name

Following are the Sterling Business Intelligence user interface elements:

✦ Menu Bar

  This contains the drop-down menus provided in the application. Use this to perform various tasks.

✦ Home Page

  This is the default page that is displayed when you log in to Sterling Business Intelligence. This page provides links to the reports and dashboards that are available in Sterling Business Intelligence. You can also view the favorite links that you have added using the Save Searches option, and links to the recently viewed dashboard and reports. For more information about the Home page, refer to the topic "Sterling Business Intelligence Home Page".

✦ Enterprise Name

  You can view the reports and dashboards pertaining to all the enterprises that you have access to. You can switch between enterprises using the Switch to option, and view the reports and dashboards pertaining to various enterprises.

Sterling Business Intelligence Home Page

The Home page is the default page that is displayed when you log in to Sterling Business Intelligence. This provides the links to the reports and dashboards that are available in Sterling Business Intelligence. Following are the various sections of the Home page:

Dashboards

The links to the dashboards that are available in Sterling Business Intelligence are listed in this panel. You can access the dashboards from the Home page and from the Order menu.

Reports

The links to the reports that are available in Sterling Business Intelligence are listed in this panel. You can access the reports from the Home page and from the Order menu.

Recently Viewed

The links to the last five dashboards or reports that you accessed are listed in this panel.

Favorites

You can label the dashboards and reports that you access or search often as favorites using the **Saved Search** option in the respective dashboard or report. The links to the first five reports or dashboards that are added as favorites are displayed in this panel.

Switch Enterprise

You can view the reports and dashboards pertaining to enterprises you have access to. You can switch to different enterprises using the Switch to option and view the reports and dashboards pertaining to these enterprises.

To switch to another enterprise, perform the following tasks:

1. Log in to the Sterling Business Intelligence application.

    The Sterling Business Intelligence Home page is displayed.

2. From the list of enterprises displayed in the **Switch to** drop-down list, select the enterprise you want to switch to.

Sterling Business Intelligence Dashboards and Reports

The following dashboards and reports are available in Sterling Business Intelligence:

✦ Perfect Order Dashboard

✦ Volume Analysis B2C Dashboard

✦ Volume Analysis B2B Dashboard

✦ Node Performance Dashboard

✦ Order Velocity Dashboard

✦ B2C Reports

✦ B2B Reports

✦ Miscellaneous Reports

View the Sterling Business Intelligence Reports and Dashboards

To view the Sterling Business Intelligence reports and dashboards in HTML and PDF formats, perform the following procedure:

1. Log in to the Sterling Business Intelligence application.

   The Sterling Business Intelligence Home page is displayed.

2. Click **Order** and select the report or dashboard that you want to view. Alternatively, click the dashboard name or report name displayed on the Home page.

   The corresponding page is displayed.

3. Select the corresponding criteria, for example, Current Year, from the drop-down lists displayed.

4. Click **Generate Report**.

   The reports or dashboards matching the selected criteria are displayed.

5. Click and select the format in which you want to view the report or dashboard.

   The report or dashboard is displayed in the selected format.

6. Click **OK** to return to the Home page.

Print Sterling Business Intelligence Reports and Dashboards

To print the Sterling Business Intelligence reports and dashboards, perform the following tasks:

1. Log in to the Sterling Business Intelligence application.

   The Sterling Business Intelligence Home page is displayed.

2. Click **Order** and select the report or dashboard you want to print.

   The corresponding report or dashboard panel is displayed.

3. Select the required criteria from the drop-down list/lists.

4. Click **Generate Report**.

   The selected report or dashboard is displayed.

5. Click and select **View in PDF Format**.

   The report or dashboard is displayed in PDF format.

6. Click the **Print** icon in the PDF file.

Saved Searches

You can view a report or dashboard by specifying the required criteria. The search criteria that you enter can be saved for future use. The saved searches will be included under **Saved Searches**. The saved searches will also be displayed in the **Favorites** panel in the **Home** page.

Using the **Saved Searches** button, you can perform the following tasks:

✦ Create a Saved Search
✦ View Saved Search

Create a Saved Search

To create a Saved Search, perform the following steps:

1. Log in to the Sterling Business Intelligence application.

   The Sterling Business Intelligence Home page is displayed.

2. Click **Order** and select the report or dashboard you want to view.

3. In the page that is displayed, select the search criteria that you want to save, for example, Current Year from the **Time Period** drop-down list.

4. Click **Saved Searches** and select **Create Saved Search**.

   A Save Search dialog box is displayed.

5. Enter a name for the saved search.

6. To add the saved search to the Favorites list in the Home page, select the **Include in favorite searches** check box.

7. Click **Save**.

   A message is displayed indicating that the search has been saved successfully. The search will be available under **Saved Searches**. If you had selected the **Include in favorite searches** check box, the link to this saved search will be displayed in the Favorites panel in the Home page.

View Saved Search

To view a saved search, perform the following steps:

1. Log in to the Sterling Business Intelligence application.

   The Sterling Business Intelligence home page is displayed.

2. Click **Order** and select the report or dashboard whose saved searches you want to view.

   The corresponding page is displayed.

3. Click **Saved Searches**.

   The saved searches are displayed in the Saved Search drop-down list.

4. Select the corresponding saved search.

   The corresponding report or dashboard is displayed. If you have more than eight saved searches for a report or dashboard, the **More Searches** option is displayed under **Saved Searches**.

5. Click **More Searches**.

   The Find Saved Searches dialog box is displayed.

6. Select the saved search you want to view and click **Select**.

   The corresponding report or dashboard is displayed.

   Notes:

   ◆ To locate a saved search whose name you are familiar with, enter the corresponding information in the **Saved Search Name Contains** field in the **Find Saved Searches** dialog box.

   ◆ You can also view the saved searches from the **Favorites** menu. For more information, refer to the topic "Manage Saved Searches".

Manage Saved Searches

Using the Manage Saved Search option, you can view, modify, and delete the saved searches that you have added using **Saved Searches > Create Saved Search**.

View Saved Searches

To view the saved searches, perform the following tasks:

1. Log in to the Sterling Business Intelligence application.

   The Sterling Business Intelligence Home page is displayed.

2. Select **Favorites > Manage Saved Search.**

   The Saved Search Management window is displayed.

3. Click **Search**.

   The saved searches are displayed.

4. Click **Favorites**, and select either the Sort Ascending or the Sort Descending option to sort the saved searches in the ascending or descending order respectively.

5. Click Columns and select or clear Saved Search Name or Favorites check boxes. When you clear the check box, the corresponding column is not displayed in the Saved Searches panel.

6. Select the required saved search and click **GO**. The corresponding report or dashboard is displayed.

Modify the Saved Searches

To modify the saved searches, perform the following tasks:

1. Log in to the Sterling Business Intelligence application.

   The Sterling Business Intelligence home page is displayed.

2. Click **Favorites > Manage Search.**

   The Saved Search Management window is displayed.

3. Click **Search**.

   The saved searches are displayed.

4. Select the required saved search you want to modify.

5. You can select or clear the Favorites check box adjacent to the corresponding saved search. When you clear the Favorites check box, the link pertaining to the saved search is not displayed in the Favorites panel in the Home page.

6. Click **Save**.

Delete the Saved Searches

To delete the saved searches, perform the following tasks:

1. Log in to the Sterling Business Intelligence application.

   The Sterling Business Intelligence home page is displayed.

2. Click **Favorites > Manage Search.**

   The Saved Search Management window is displayed.

3. Click **Search**.

   The saved searches are displayed.

4. Select the required saved searches you want to delete.

5. Click **Delete**.

6. At the prompt, click **Yes**.

Perfect Order Dashboard

The Perfect Order Dashboard displays the metrics that have been captured at various stages of the order fulfillment cycle. The Perfect Order Dashboard enables organizations to understand how they have managed customer expectations.

The Perfect Order Dashboard displays the following metrics:

✦ Percentage Modified

✦ Average Exception Lead Time For ASAP Orders

✦ Percentage Shipped on Time

✦ Percentage Inventory Exception Delays

✦ Average Delay for Delayed Orders

✦ Average Capture to Shipment Time for ASAP Orders

✦ Percentage Authorization Failure

✦ Percentage Settlement Failure

Dashboard Criteria

In the Perfect Order Dashboard, you can view the metrics for the following time periods:

✦ Current Quarter

✦ Current Year

✦ Current Week

✦ Last Week

✦ Last Year

Based on the time period you select, the corresponding metric is displayed.

See also:

Metrics Displayed in the Perfect Order Dashboard.

To Generate the Perfect Order Dashboard

To generate the Perfect Order Dashboard, perform the following tasks:

1. Log in to Sterling Business Intelligence.

   The Sterling Business Intelligence home page is displayed.

2. Select **Order** > **Perfect Order Dashboard**.

   The Perfect Order Dashboard panel is displayed.

3. Select a Time Period from the drop-down list, for example, Current Year.

4. Click **Generate Report** to generate the report.

   The Perfect Order Dashboard is displayed.

Gauge Diagram in Perfect Order Dashboard

In the Perfect Order Dashboard, the metrics are displayed in the form of gauge diagrams.

The gauge diagram uses three colors -green, amber, and red indicating the range or percentage value from zero to hundred respectively. The green color indicates good, amber indicates caution, and red indicates trouble. It has a needle at the center, which points to the exact measured value. By default, the green, amber and red value thresholds are set up at <20%, 20-80%, and >80 respectively.

When you pause the mouse pointer on the needle, a ToolTip is displayed indicating the exact percentage of orders modified.

Note: When there are no orders matching a selected criteria, the needle will not be displayed in the gauge diagram indicating that no orders (0%) were modified.

Metrics Displayed in the Perfect Order Dashboard

The metrics displayed in the Perfect Order Dashboard are captured and categorized based on the various stages of an order fulfillment life cycle as follows:

✦ Opportunity to Capture
✦ Capture to Fulfillment
✦ Completion to Settlement

You can view various reports pertaining to these stages by right-clicking on some of the metrics. These reports are referred to as drill through reports. A note is displayed indicating that a drill-through report is available for that particular metric.

Opportunity to Capture

In the Opportunity to Capture section, you can view the following metrics:

✦ Percentage Modified
✦ Average Expectation Lead Time for ASAP Orders

Percentage Modified

The Percentage Modified metric provides information about the percentage of orders that have been manually modified from amongst the orders that were confirmed during a selected time period. This metric is displayed in the form of a gauge diagram.

% Modified = (Number of Orders modified manually after confirmation / Total number of Orders confirmed) * 100

The Percentage Modified metric helps identify the number of orders that have undergone modifications. This metric also provides a break up of the various types of modifications. You can analyze the data and gather information about the major changes an order has undergone, and use this analysis to improve the accuracy of the Order Capture procedures.

Note: An order that is modified has a value in the Modified User ID field. When the value in this field does not belong to the system user group, then the order is considered as manually modified. The modifications at the order level are only considered for the analysis.

Average Expectation Lead Time for ASAP Orders

ASAP orders are orders that do not have a requested ship date and requested delivery date. The system computes a date that it promises to customer as the date by which the customer could expect the order to be shipped. This metric applies to only those orders which qualify the ASAP criteria. Expectation lead is computed for every order line and stored up to the last minute. The expectation lead time for ASAP orders is defined as the time between the promised date and confirmed date. Based on a selected time period, all order lines whose promised date falls within the time period are averaged out to arrive at the average expectation lead time.

Average Expectation Lead Time Delay for ASAP Orders = Sum (Promised Date- Confirmed Date)/Number of ASAP Order Lines

This metric helps an organization to arrive at an expected ship date based on facts that can be communicated to customers.

Capture to Fulfillment

In the Capture to Fulfillment section, you can view the following metrics:

✦ Percentage Shipped on Time
✦ Percentage Inventory Exception Delays
✦ Average Delay for Delayed Orders
✦ Average Capture to Shipment Time for ASAP Orders

Percentage Shipped on Time

The Percentage Shipped on Time metric provides information about the percentage of order lines that are shipped on or before the first promised date, where the promised date falls during the selected time period. This metric is displayed in the form of a gauge diagram.

%Shipped on Time = (Number of Order Lines Shipped with Delay Less than or equal to Zero / Total Number of Order Lines Shipped) * 100

This metric helps the operations manager of an organization to obtain a direct view into the shipping performance of nodes, and to analyze how the performance will affect the delivery dates of the shipments. This report can also be used to track the lead time required for processing at a node, and to understand whether the ship date set with the customers is accurate.

Drill Through Reports for Percentage Shipped on Time Metric

From the Percentage Shipped on Time metric you can drill through and view reports pertaining to shipment nodes, channels, and categories. Right-click the needle and select the required report. Following are the reports available for this metric:

✦ Percentage Shipped on Time by Third-Party Ship Nodes

The Percentage Shipped on Time by Third Party Ship Nodes report provides information about the top ten third party ship nodes based on the percentage of order lines that have been shipped on time for a selected time period. This report is displayed in the form of a bar graph. In this report you can also view summary details such as the ship node code and percentage of orders shipped on time for each node for all orders that have been shipped on time.

This report helps an organization to analyze the performance of nodes.

✦ Percentage Shipped on Time by Channels

Orders can be booked through various channels such as an e-mail, catalog, or through a customer service executive. The Percentage Shipped on Time by Channels report provides information about the top ten channels based on the percentage of order lines that have been shipped on time for a selected time period. This report is displayed in the form of a bar graph. This report also displays summary

details such as the channel code and percentage of orders shipped on time for each channel for all orders that have been shipped on time.

This report helps an organization to understand the fulfillment efficiency of each channel.

✦ Percentage Shipped on Time by Categories

The Percentage Shipped on Time by Categories report provides information about the top ten categories based on the percentage of order lines that have been shipped on time for a selected time period. This report is displayed in the form of a bar graph. This report also displays summary details such as the top ten category names and the percentage of order lines shipped for each product for all orders that have been shipped on time.

This report helps the organization to understand the top ten products that are shipped on time.

Percentage Inventory Exception Delays

This metric is the ratio of the number of order lines that have been backordered to the number of order lines shipped for the first promised date of the order, where the first promised date of the order falls within the selected time period. This metric is displayed in the form of a gauge diagram.

% Inventory Exceptions = (Number of Order Lines Not Shipped on Time and Back Ordered /Total Number of Order Lines Shipped) * 100

This report helps the organization to analyze the contribution of inventory related delays to overall delays in shipping orders on time.

Drill Through Reports for Percentage Inventory Exception Delays

From the Percentage Inventory Exception Delays metric, you can drill through to reports pertaining to channels and categories. Right-click the needle and select the required report. Following are the reports available for this metric:

✦ Percentage Inventory Exception by Channel

The Percentage Inventory Exception by Channel report provides information about the top ten channels based on the percentage of order lines that were backordered for a selected time period. This report is displayed in the form of a bar graph. This report also displays summary details such as channel codes and percentage of the order lines backordered for each channel for all the backorders.

This report enables an organization to identify the percentage of order lines that do not have enough inventory and the fulfillment efficiency of each channel.

✦ Percentage Inventory Exception by Categories

The Percentage Inventory Exception by Categories report provides information about the percentage of order lines that were backordered for the top ten categories for a selected time period. This report is displayed in the form of a bar graph. This report also displays summary details such as the top level categories and the percentage of order lines backordered for each category for all the backorders.

This report enables an organization to identify the top ten categories that did not have the necessary supply, and to store the required inventory of these products.

Average Delay for Delayed Orders

The Average Delay for Delayed Orders metric provides information about the average delay in shipping the order lines that are shipped after the promised date, where the ship date falls within the selected time period.

Average Delay for Delayed Orders = Sum (Ship Date - Promised Date) / Total Number of Delayed Order Lines

Average Capture to Shipment Time for ASAP Orders

ASAP orders are orders that do not have a requested ship date and requested delivery date. The system computes a date that it promises to customer as the date by which the customer could expect the order to be shipped. This metric applies to only those orders which qualify the ASAP criteria. The Average Capture to Shipment Time for ASAP Orders metric provides information about the average amount of time between the stage when order line is captured to the time when they are shipped, where the actual ship date falls within the selected time period.

Average Capture to Shipment Time for ASAP Orders = Sum (Ship Date- Confirmed Date) / Total Number of ASAP Shipped Order Lines

Completion to Settlement

In the Completion to Settlement section, you can view the following metrics:

Percentage Authorization Failure

The Percentage Authorization Failure metric provides information about the number of payment instruments that failed during the authorization of payment for a selected period. This metric is displayed in the form of a gauge diagram.

% Authorization Failure = Number of Authorization Failures / Number of Payment Transactions

Percentage Settlement Failure

The Percentage Settlement Failure metric provides information about the number of settlements that failed during the settlement cycle for a selected time period. This metric is displayed in the form of a gauge diagram.

% Settlement Failure = Number of Settlement Failures / Number of Payment Transactions

Volume Analysis B2C Dashboard

The Volume Analysis B2C Dashboard provides information about the revenue generated for a selected time period. The Volume Analysis B2C Dashboard helps the organization to understand how well they are managing business. Analysis by product category helps customer to understand the distribution of revenue for each product category. The Volume Analysis B2C Dashboard also helps an organization to identify the distribution of revenue pertaining to a particular region.

The Volume Analysis B2C Dashboard displays the following metrics:

✦ Booked Value

✦ Fulfilled Revenue

✦ Per Order Metrics

✦ Product Category Distribution

✦ Region Distribution

Dashboard Criteria

In the Volume Analysis B2C Dashboard, you must select a time period from the drop-down list. You can select a time period from the drop-down list. Following are the time periods:

◆ Last Week

◆ Current Week

◆ Current Quarter

◆ Last Year

◆ Current Year

When you select a required time period, the corresponding metric is displayed.

See also:

Metrics Displayed in the Volume Analysis B2C Dashboard

To Generate the Volume Analysis B2C Dashboard

To generate the Volume Analysis B2C Dashboard, perform the following tasks:

1. Log in to Sterling Business Intelligence.

   The Sterling Business Intelligence home page is displayed.

2. Select **Order** > **Volume Analysis B2C Dashboard**.

   The Volume Analysis B2C panel is displayed.

3. From the Time Period drop-down list, select a value, for example, Current Year.

4. Click **Generate Repor**t.

   The Volume Analysis B2C Dashboard is displayed.

Metrics Displayed in the Volume Analysis B2C Dashboard

The metric displayed in the Volume Analysis B2C Dashboard are captured and categorized as follows:

- ✦ Booked Value
- ✦ Fulfilled Revenue
- ✦ Per Order Metric
- ✦ Product Category Distribution
- ✦ Region Distribution

You can view detailed (drill-through) reports pertaining to a metric by right-clicking on the metric that have a note stating "Drill Through is Available on Chart". To view the drill-down reports, click the graph you want to drill-down. You must select the corresponding report for the required time period. The drill-down reports display the details pertaining to the next level of hierarchy. For example, when you click on a bar graph pertaining to a quarter, you can view the report pertaining to the months in that quarter.

Booked Value

The Booked Value metric provides information about the total value of the booking made for all the confirmed orders for a selected period, where the confirmed date of the orders are within the selected time period. This metric is displayed in the form of bar graph and a line graph. The bar graph represents booked value and the line graph represents the confirmed orders.

Booked Value = Sum of the Booked Values of All Confirmed Orders

Drill-Through Reports for Booked Value Metric

From the Booked Value metric, you can view the drill-through reports by right-clicking on the corresponding report for the time period. Following are the drill-through reports available for this metric:

- ✦ Volume Analysis B2C by Quarter

    The Volume Analysis B2C by Quarter report provides information about the total value of the booking made for a selected quarter. This metric is displayed in the form of a bar graph. Based on the booking values, the top ten booked values are displayed in the bar graph. You can also view summary details such as booked value, month, number of confirmed orders, and number of order lines confirmed for all the confirmed orders.

- ✦ Volume Analysis B2C by Month

    The Volume Analysis B2C by Month report provides information about the total value of the bookings made for a selected month.

- ✦ Volume Analysis B2C by Day

    The Volume Analysis B2C by Day report provides information about the total value of the bookings made for a selected day.

Drill-Down and Drill-Up Reports for Booked Value Metric

From the Booked Value metric, you can drill-down to the next level of hierarchy by clicking on the required time period (bar) to view the corresponding report. For example, you can view the total value of the booking made in a day by clicking on the required month, and then drill-up to compare the booked value for the selected month.

Fulfilled Revenue

The Fulfilled Revenue metric provides information about the revenue and the number of order lines shipped, where the ship date of the order lines is within the selected time period. This metric is displayed in the form of a bar graph and a line graph. The bar graph represents the fulfilled revenue and the line graph represents the shipped orders.

Fulfilled Revenue = Total Value of All the Order Lines That Are Shipped

Drill-Through Reports for Fulfilled Revenue Metric

From the Fulfilled Revenue metric, you can drill through to reports pertaining to volume by day, month, and quarter. Following are the drill-through reports available for this metric:

✦ Volume Analysis by Quarter

The Volume Analysis B2C by Quarter report provides information about the fulfilled revenue for a selected quarter for all the shipped orders. This metric is displayed in the form of a bar graph. Based on the fulfilled revenue, the top ten fulfilled revenues are displayed in the bar graph. You can also view summary details such as the month, fulfilled revenue, and number of order lines shipped for all the shipped orders for a quarter.

✦ Volume Analysis by Month

The Volume Analysis B2C by Month report provides information about the fulfilled revenue for a selected month for all the shipped orders.

✦ Volume Analysis by Day

The Volume Analysis B2C by Quarter report provides information about the fulfilled revenue for a selected day for all the shipped orders.

Drill-Down and Drill-Up Reports for Fulfilled Revenue Metric

From the Fulfilled Revenue metric, you can drill-down to the next level of hierarchy by clicking on the required time period (bar) to view the corresponding report. For example, you can view the fulfilled revenue for a day by clicking on the required month and then drill-up to compare the fulfilled revenue for the selected month.

Per Order Metric

The Per Order Metric provides information about the average order lines for each order and the average value of confirmed orders, where the confirmed date of the order falls within the selected time period. This metric is displayed as a combination of a bar graph and a line graph. The bar graph represents the average order lines per order and the line graph represents average value of an order.

Average order lines per order = Total number of order lines / Total orders confirmed

Average value of confirmed orders = Total value of order lines / Total orders confirmed

Product Category Distribution

The Product Category Distribution metric provides information about the percentage of revenue generated by each product category that are shipped, where the actual ship date falls within the selected time period. This metric is displayed in the form of a pie-chart. You can drill-through to reports for a specific category and view the revenue generated by the specific category.

Note: When a product is not associated with a category at a particular level in the hierarchy, which is indicated by a '-' in the pie chart, the drill-through and drill-down reports are not supported.

Drill-Through Reports for Product Category Distribution Metric

From the Product Category Distribution metric, you can view the following drill-through reports:

✦ Top 10 Products by Quantity

The top 10 Products by Quantity report provides information about the top ten products for the selected category displayed in descending order of the quantity sold. In this report you can also view summary details such as product code and fulfilled quantity pertaining to all the products of the selected category.

✦ Top 10 Products by Revenue

The Volume Analysis B2C by Month report provides information about the top ten products for the selected category displayed in descending order of the revenue generated. In this report you can also view summary details such as currency and fulfilled revenue pertaining to all the products of the selected category.

Drill-Down and Drill-Up Reports for Product Category Distribution Metric

From the Product Category Distribution metric, you can drill-down to the next level of product hierarchy by clicking on the required product to view the corresponding report. For example, when you select the category as electronic items in the report, you can drill-down to view the report for television, digital video disc, record player, and so on.

Region Distribution

The Region Distribution metric provides information about the distribution of fulfilled revenue by the business centers of the enterprise in various regions, where the actual ship date falls within the selected time period. This metric is displayed in the form of a pie chart.

Note: A region typically has country or world as the highest level in hierarchy. The Region Distribution pie chart displays the details of fulfilled revenue from the second level of hierarchy to prevent an additional drill-down. For example, the first level of hierarchy can be United States of America and in second level you can classify the regions into North, South, East, and West. In the Region Distribution pie chart, you can view the distribution for the second level classification of the regions such as North, South, East, and West.

Drill-Through Reports for Region Distribution Metric

From the Region Distribution metric, you can view the following drill-through reports:

✦ Top 10 Products-Quantity (B2C) (Summary/Detail) by Region

The Top 10 Products by Quantity (B2C) (Summary/Detail) by Region report provides information about the top ten products for the selected region displayed in descending order of the quantity shipped.

✦ Top 10 Products-Revenue (B2C) (Summary/Detail) by Region

The Top 10 Products by Quantity (B2C) (Summary/Detail) by Region report provides information about the top ten products for the selected region displayed in descending order of the revenue generated.

Volume Analysis B2B Dashboard

The Volume Analysis B2B Dashboard provides insights into the business volume of the buyer partners of an enterprise. The orders captured are a good estimate of the volume of business that an enterprise is generating. Analysis by product category or product enables an organization to identify its most profitable products.

The Volume Analysis B2B Dashboard displays the following metrics:

✦ Booked Value

✦ Fulfilled Revenue

✦ Per Order Metric

✦ Product Category Distribution

✦ Seller Distribution

Dashboard Criteria

In the Volume Analysis B2B Dashboard, you can view the metrics for the following time periods:

✦ Last Week

✦ Current Week

✦ Current Quarter

✦ Last Year

✦ Current Year

When you select the required time period, the corresponding metric is displayed.

See also:

Metrics Displayed in the Volume Analysis B2B Dashboard

To Generate the Volume Analysis B2B Dashboard

To generate the Volume Analysis B2B Dashboard, perform the following tasks:

1. Log in to Sterling Business Intelligence.

   The Sterling Business Intelligence home page is displayed.

2. Select **Order** > **Volume Analysis B2B Dashboard**.

   The Volume Analysis B2B panel is displayed.

3. Select the Time Period from the drop-down list, for example, Current Year.

4. Then click **Generate Repor**t to generate the report.

   The Volume Analysis B2B Dashboard is displayed.

Metrics Displayed in the Volume Analysis B2B Dashboard

The metrics displayed in the Volume Analysis B2B Dashboard are captured and categorized as follows:

✦ Booked Value
✦ Fulfilled Revenue
✦ Per Order Metric
✦ Product Category Distribution
✦ Seller Distribution

You can view the detailed (drill-through) reports pertaining to metrics by right-clicking on the metrics. A note is displayed indicating that a drill through report is available for a particular metric. You can also drill down to reports for some metrics. To view the drill down reports, click on the graph you want to drill down. You must select the corresponding report for the required time period. The drill down reports display the details for the next level of hierarchy. For example, when you click on a bar graph for the quarter, you can view the report for the months in that quarter.

Booked Value

The Booked Value metric provides information about the total value of the booking made for a selected time period. This metric is displayed as a combination of bar graphs and a line graph. The bar graph represents booked value and the line graph represents the confirmed orders. This report enables an organization to the identify volume of business that an enterprise is making for a selected time period.

This metric is the total of the booked values of all confirmed orders, where the confirmed date of the orders are within the selected time period.

Drill Through Reports for Booked Value

From the Booked Value metric, you can view the reports by right-clicking on the corresponding report for the time period. You can view three drill through reports for Booked Value metric for the time periods: quarter, month, and day.

Volume Analysis B2B by Quarter

The Volume Analysis B2B by Quarter report provides information about the total value of the booking made for a selected quarter. This metric is displayed as a bar graph. Based on the booking values, the top ten booked values are displayed in the bar graph. In this report you can also view summary details such as booked value, month, and number of order lines confirmed for all the confirmed orders.

Similarly the report for Volume Analysis B2B by month and day provides information about the total value of the booking made for a selected month and day respectively.

Drill Down Reports for Booked Value Metric

From the Booked Value metric, you can drill down to the next level of hierarchy by clicking on the required time period (bar) to view the corresponding report.

Fulfilled Revenue

The Fulfilled Revenue metric provides information about the revenue and the number of order lines shipped for a selected time period. This metric is displayed as a combination of bar graphs and a line graph. The bar graph represents the fulfilled revenue and the line graph represents the shipped orders. This provides insights to the revenue generated by the organization for a selected time period.

This metric is the sum of the total value of all the order lines that are shipped, where the actual ship date of the order lines is within the selected time period.

Drill Through Reports for Fulfilled Revenue

From the Fulfilled Revenue metric, you can drill through to reports pertaining to volume by day, month, and quarter. Following are the drill through reports available for this metric:

✦ Volume Analysis by Quarter

✦ Volume Analysis by Month

✦ Volume Analysis by Day

Volume Analysis by Quarter

The Volume Analysis B2B by Quarter report provides information about the fulfilled revenue for a selected quarter for all the shipped orders. This metric is displayed as a bar graph. Based on the fulfilled revenue, the top ten fulfilled revenues are displayed in the bar graph. In this report you can also view summary details such as the month, fulfilled revenue, and number of order lines shipped for all the shipped orders for a quarter.

The report for Volume Analysis B2B by month and day for the Fulfilled Revenue metric provides information about the total revenue generated for a selected month and day respectively.

Drill Down Reports for Fulfilled Revenue

From the Fulfilled Revenue metric, you can drill down to reports for the next level of hierarchy. When you click on the required time period (bar) the corresponding report is displayed.

Per Order Metric

The Per Order Metric provides information about the average order lines for each order and the average value of confirmed orders, where the confirmed date of the order falls within the selected time period. This metric is displayed as a combination of a bar graph and a line graph. The bar graph represents the average order lines per order and the line graph represents average value of an order.

Average order lines per order = Total number order lines/ Total orders confirmed

Average value of confirmed orders = Total value of order lines/ Total orders confirmed

Product Category Distribution

The Product Category Distribution metric provides information about the percentage of revenue generated by each product categories that are shipped, where the actual ship date falls within the selected time period. This metric is displayed in the form of a pie-chart. You can drill through to reports for a specific category and view the revenue generated by the specific category. This chart helps the organization to identify its most revenue generating products.

Note: When a product is not associated with a category, the drill through and drill down reports are not supported.

Seller Distribution

The Seller Distribution metric provides information about the distribution of revenue for various sellers of the enterprise, where the actual ship date falls within the selected time period. This metric is displayed in the form of a pie-chart.This chart helps the enterprise to identify its most revenue generating sellers and to negotiate a better cost structure with these sellers.

Order Velocity Dashboard

The Order Velocity Dashboard helps organizations understand how they are managing the order shipments. These metrics also enables organizations identify the reasons for delay in shipments.

The Order Velocity Dashboard displays the following metrics:

✦ Average Order to Release Time
✦ Average Capture to Shipment Time (ASAP)
✦ Release to Shipment Time
✦ Average Hold Duration
✦ Hold Type Distribution

Dashboard Criteria

In the Order Velocity Dashboard, you can view the metrics pertaining to the following time periods:

✦ Last Week
✦ Current Week
✦ Current Quarter
✦ Last Year
✦ Current Year

Based on the time period you select, the corresponding metric is displayed.

See also:

Metrics Displayed in the Order Velocity Dashboard

To Generate the Order Velocity Dashboard

To generate the Order Velocity Dashboard, perform the following steps:

1. Log in to Sterling Business Intelligence.

    The Sterling Business Intelligence home page is displayed.

2. Select **Order** > **Order Velocity Dashboard**.

    The Order Velocity panel is displayed.

3. From the Time Period drop-down list, select a value, for example, Current Year.

4. Click **Generate Report**.

    The Order Velocity Dashboard is displayed.

Metrics Displayed in the Order Velocity Dashboard

The metrics displayed in the Order Velocity Dashboard are captured and categorized based on various stages of an order fulfillment life cycle. The categorizations are:

✦ Capture to Release Time
✦ Capture to Shipment Time
✦ Release to Shipment Time
✦ Hold Type Distribution
✦ Hold Duration

The metrics in the Order Velocity Dashboard enables the organization to understand the time taken to move the order from the order capture stage to the shipment stage.

Capture to Release Time

In Capture to Release Time of Order Velocity Dashboard, you can view the Average Order to Release Time metric. The Average Order to Release Time metric provides information about the average time required to move the order lines from the order capture stage to the order release stage for various fulfillment types, where the confirmation date is within the selected time period. This metric is displayed in the form of a bar graph. The average order to release time is displayed in minutes.

Average Order to Release Time = Sum [(Release Date - Confirmed Date) for all Order Lines] / Total Number of Released Order Lines

Capture to Shipment Time

In Capture to Shipment Time of Order Velocity Dashboard, you can view the Average Capture to Shipment Time (ASAP) metric.

ASAP orders are orders that do not have a requested ship date. The system computes a date that is promised to a customer and is the date by which the customer can expect the order to be shipped. This metric applies to only those orders which qualify the ASAP criteria.

The Average Capture to Shipment Time (ASAP) metric provides information about the average time taken to move the confirmed order lines from the order capture stage to the shipment stage for various fulfillment types, where the ship date is within the selected time period. This metric is displayed in the form of a bar graph. The average capture to shipment time is displayed in minutes.

Average Capture to Shipment Time (ASAP) = Sum (Ship Date - Confirmed Date) / Total Number of ASAP Shipped Order Lines

Release to Shipment Time

The time taken to move an order line from the release status to the shipped status is categorized based on the time range (days) as listed here:

✦ <1 day

This time range indicates that the time taken to move the order lines from the release status to the shipped status is less than a day.

✦ 1<2 days

This time range indicates that the time taken to move the order lines from the release status to the shipped status is one day or more than one day, but less than two days.

✦ 2<3 days

This time range indicates that the time taken to move the order lines from the release status to the shipped status is two days or more than two days, but less than three days.

✦ 3<4 days

This time range indicates that the time taken to move the order lines from the release status to the shipped status is three days or more than three days, but less than four days.

✦ 4<5 days

This time range indicates that the time taken to move the order lines from the release status to the shipped status is four days or more than four days, but less than five days.

✦ >=5 days

This time range indicates that the time taken to move the order lines from the release status to the shipped status is more than or equal to five days.

The Release to Shipment Time metric provides information about the percentage of orders shipped during the defined time range explained here, where the ship date is within the selected time period. This metric is displayed in the form of a pie chart.

Note: When there are no order lines shipped for a time range, the time range is not displayed in the graph.

Release to Shipment Time = Sum (Ship Date - Release Date) / Total Number of Shipped Order Lines

Hold Type Distribution

The Hold Type Distribution metric provides information about the percentage of orders that are on hold for various hold types, where the date on which the hold applied on the orders is resolved is within the selected time period. The hold types can pertain to fraud check, address verification, duplicate order, and so on. This metric is displayed in the form of a pie chart.

Hold Duration

The Average Hold Duration metric provides information about the average time the orders are kept on hold for various hold types, where the hold resolved date is during the selected time period. This metric is displayed in the form of a bar graph.

Average Hold Duration = Total Hold Duration / Total Number of Orders Kept On Hold

Node Performance Dashboard

The Node Performance Dashboard provides visibility into the fulfillment efficiency process at a node. The Node Performance Dashboard displays the following metrics:

✦ Number of Shipment Lines Shipped

✦ Release to Shipment Time

✦ Average Delay in Shipment

✦ Percentage Backtracked from Node

✦ Percentage Procured for Node

Dashboard Criteria

In the Node Performance Dashboard, you must select a time period and node from the corresponding drop-down lists. You can view the metrics pertaining to the following time periods:

✦ Last Week

✦ Current Week

✦ Current Quarter

✦ Last Year

✦ Current Year

Based on the time period and node you select, the corresponding metric is displayed.

See Also:

Metrics Displayed in the Node Performance Dashboard

To Generate the Node Performance Dashboard

To generate the Node Performance Dashboard, perform the following steps:

1. Log in to Sterling Business Intelligence.

   The Sterling Business Intelligence home page is displayed.

2. Select **Order** > **Node Performance Dashboard**.

   The Node Performance panel is displayed.

3. From the **Time Period** and **Node** drop-down lists, select the corresponding values, for example, Current Year and Node1.

4. Click **Generate Report**.

   The Node Performance Dashboard is displayed.

Metrics Displayed in the Node Performance Dashboard

The metrics displayed in the Node Performance Dashboard are captured and categorized as follows:

✦ Per Shipment Metrics

✦ Release to Shipment Time

✦ Backorder Metric

✦ Procurement Metric

You can view the detailed (drill-through) reports pertaining to metrics by right-clicking the metrics. A note is displayed indicating that a drill-through report is available for a particular metric. You can also drill-down to reports for some metrics. To view the drill-down reports, click on the graph you want to drill-down. You must select the corresponding report for the required time period. The drill-down reports display the details for the next level of hierarchy. For example, when you click on a bar graph for the quarter, you can view the report for the months in that quarter.

The metrics in the Node Performance Dashboard helps to identify the efficiency of the fulfilment execution process of the selected node.

Per Shipment Metrics

In the Per Shipment Metrics, you can view the following metrics:

✦ Number of Shipment Lines Shipped

The Number of Shipment Lines Shipped metric provides information about the total number of shipment lines shipped for a selected time period and node, where the ship date falls within the selected time period. This metric is displayed in the form of a bar graph.

Number of Shipment Lines Shipped = Sum Of All The Shipment Lines Shipped For The Selected Node

✦ Number of Shipments Shipped

The Number of Shipment Shipped metric provides information about the number of shipment shipped for the selected time period and node, where the ship date falls within the selected time period. This metric is displayed in the form of a line graph.

Number of Shipment Shipped= Sum Of All The Shipments Shipped for the Selected Node

Drill-Through Reports for Per Shipment Metrics

In the Per Shipment Metrics, you can view drill-through reports by right-clicking the bar pertaining to the corresponding time period. You can view three drill-through reports for Per Shipment Metrics for the time periods quarter, month, and day.

✦ Shipment Line Fulfilled Revenue by Quarter

The Shipment Line Fulfilled Revenue by Quarter report provides information about the top ten shipment line fulfilled revenues generated for the selected quarter ordered in descending order of the fulfilled revenue, where the ship date is within the selected period. This metric is displayed in the form

of a bar graph. You can also view summary details pertaining to a node, such as quarter and shipment line fulfillment revenue, for all the shipment lines for the selected period.

✦ Shipment Line Fulfilled Revenue by Month

The Shipment Line Fulfilled Revenue by Month report provides information about the top ten shipment line fulfilled revenues pertaining to the shipment shipped for the selected month. The report is displayed in the descending order of the fulfilled revenue, where the ship date is within the selected period.

✦ Shipment Line Fulfilled Revenue by Day

The Shipment Line Fulfilled Revenue by Day report provides information about the top ten shipment line fulfilled revenues pertaining to the shipment shipped for a selected day. The report is displayed in the descending order of the fulfilled revenue, where the ship date is within the selected period.

Release to Shipment Time

In the Release to Shipment Time, the following metrics are displayed:

✦ Release to Shipment Time

The percentage of shipment lines shipped from the selected node is categorized based on the time range as listed here:

◆ <1 day

This time range indicates that the time taken to move the shipment lines from the release status to the shipped status is less than a day.

◆ 1<2 days

This time range indicates that the time taken to move the shipment lines from the release status to the shipped status is one day or more than a day, but less than two days.

◆ 2<3 days

This time range indicates that the time taken to move the shipment lines from the release status to the shipped status is two days or more than two days, but less than three days.

◆ 3<4 days

This time range indicates that the time taken to move the shipment lines from the release status to the shipped status is three days or more than three days, but less than four days.

◆ 4<5 days

This time range indicates that the time taken to move the shipment lines from the release status to the shipped status is four days or more than four days, but less than five days.

◆ >5 days

This time range indicates that the time taken to move the shipment lines from the release status to the shipped status is more than five days.

The Release to Shipment Time metric provides information about the percentage of shipment lines shipped from the selected node and during the defined time range explained here, where the ship date is within the selected time period. This metric is displayed as a pie chart.

Note: When there are no shipment lines shipped during a time range, the time range is not displayed in the graph.

Release to Shipment Time = Ship Date - Release Date

✦ Average Delay in Shipment

The Average Delay in Shipment metric provides information about the average delay in the delayed shipments shipped for the selected time period and node, where the ship date is within the selected time period. The average delay in shipment is stored in minutes, and displayed in days, hours and minutes.

Average Delay in Shipment = Actual Ship Date - Expected Ship Date

Backorder Metric

In the Backorder Metric section, the Percentage Backordered From Node metric provides information about the percentage of shipment lines backordered from the selected node and time period, where the ship date is within the selected time period.This metric is displayed in the form of a gauge diagram.

Percentage Backordered From Node = Number of Shipment Lines Backordered From Node / Total Number of Shipment Lines Shipped

Drill-Through Report for Backordered Metric

From the Percentage Backordered From Node metric, you can view the Backordered from Node by Categories report by right-clicking on the needle of the gauge diagram. The Backordered from Node by Categories report displays the top ten categories ordered in the descending order of the backordered percentage.

Procurement Metric

In the Procurement Metric section, the Percentage Procured for Node metric provides information about the percentage of shipment lines procured for the selected node, where the ship date of the shipment that is linked to the procurement is within the selected time period.This metric is displayed in the form of a gauge diagram.

Percentage Procured for Node = Number of Shipment Lines Procured / Total Number of Shipment Lines Shipped

Drill-Through Reports for Procurement Metric

From the Percentage Procured for Node Metric, you can view the Procured from Node by Categories report by right-clicking on the needle of the gauge diagram. This report displays the top ten categories ordered in

the descending order of the percentage procured for the selected time period, where ship date is within the selected time period.

B2C Reports

In Sterling Business Intelligence, the B2C reports provide information about the volume of business generated from B2C (business-to-consumer or business-to-customer) orders. You can view the following reports:

✦ Fulfilled Revenue By Week

✦ Booked Value By Week

✦ Fulfilled Revenue By Year

✦ Booked Value By Year

✦ Top 10 B2C Products By Revenue

✦ Top 10 B2C Products By Quantity

To Generate the B2C Reports

To generate the B2C reports, perform the following tasks:

1. Log in to Sterling Business Intelligence.

   The **Sterling Business Intelligence Home** page is displayed.

2. Select **Order** > **B2C Reports** and select the required report you want to view.

3. From the **Time Period** drop-down list, select a value, for example, Current Year.

4. Click **Generate Report**.

   The selected report is displayed.

Fulfilled Revenue By Week

The Fulfilled Revenue By Week report provides information about the fulfilled revenue for a selected week for all the shipped order lines, where the ship date is within the selected time period. You can view the report for the current week and previous week. The details displayed in this report pertain to the B2C orders only. In this report, you can also view the following summary details:

✦ Calendar Date

✦ Fulfilled Revenue

✦ Number of Orders Shipped

✦ Number of Order Lines Shipped

Booked Value By Week

The Booked Value By Week report provides information about the booked value for the selected week for all the confirmed order lines, where the confirm date is within the selected time period. The details displayed in this report pertain to the B2C orders only. You can view the report for the current week and previous week. The report is displayed in the form of a bar graph. In this report, you can also view the following summary details:

✦ Calendar Date

✦ Calender Weekday

✦ Booked Value

✦ Number of Orders Shipped

✦ Number of Order Lines Shipped

Fulfilled Revenue By Year

The Fulfilled Revenue By Year report provides information about the fulfilled revenue for the selected year for all the shipped order lines, where the ship date is within the selected time period. The details displayed in this report pertain to B2C orders only. You can view the report for the current year and previous year. The report is displayed in the form of a bar graph. In this report, you can also view the following summary details:

✦ Month
✦ Fulfilled Revenue
✦ Number of Orders Shipped
✦ Number of Order Lines Shipped

Booked Value By Year

The Volume Analysis Booked Value By Year report provides information about the booked value for the selected year for all the confirmed order lines, where the confirm date is within the selected time period. The details displayed in this report pertain to the B2C orders only. You can view the report for the current year and previous year. The report is displayed in the form of a bar graph. In this report, you can also view the following summary details:

✦ Month
✦ Booked Value
✦ Number of Orders Shipped
✦ Number of Order Lines Shipped

Top 10 B2C Products By Revenue

The Top 10 B2C Products by Revenue report provides information about the top 10 products for the selected period and is displayed in the descending order of the revenue generated, where the ship date is within the selected period. You can view this report pertaining to the following time periods:

✦ Current Quarter

✦ Current Week

✦ Current Year

✦ Last Week

✦ Last Year

In this report, you can also view the summary details such as currency and fulfilled revenue.

Top 10 B2C Products By Quantity

The Top 10 B2C Products by Quantity report provides information about the top 10 products for the selected period and is displayed in the descending order of the quantity shipped, where the ship date is within the selected period. You can view this report pertaining to the following time periods:

✦ Current Quarter

✦ Current Week

✦ Current Year

✦ Last Week

✦ Last Year

The report is displayed in the form of a bar graph. In this report, you can also view the summary details such as product code and fulfilled quantity.

B2B Reports

In Sterling Business Intelligence, the B2B reports provide information about the volume of business generated from B2B (business-to-business) orders. You can view the following reports:

✦ Fulfilled Revenue By Week

✦ Booked Value By Week

✦ Fulfilled Revenue By Year

✦ Booked Value By Year

✦ Top 10 B2B Products By Revenue

✦ Top 10 B2B Products By Quantity

To Generate the B2B Reports

To generate the B2B reports, perform the following tasks:

1. Log in to Sterling Business Intelligence.

   The **Sterling Business Intelligence Home** page is displayed.

2. Select **Order** > **B2B Reports** and select the required report you want to view.

3. From the **Time Period** drop-down list, select a value, for example, Current Year.

4. Click **Generate Report**.

   The selected report is displayed.

Fulfilled Revenue By Week

The Fulfilled Revenue By Week report provides information about the fulfilled revenue for a selected week for all the shipped order lines, where the ship date is within the selected time period. You can view the report for the current week and the previous week. The details displayed in this report pertain to the B2B orders only. This report is displayed in the form of a bar graph. In this report, you can also view the following summary details:

✦ Calendar Date

✦ Calendar Weekday

✦ Fulfilled Revenue

✦ Number of Orders Shipped

✦ Number of Order Lines Shipped

Booked Value By Week

The Booked Value By Week report provides information about the booked value for the selected week for all the confirmed order lines, where the confirm date is within the selected time period. The details displayed in this report pertain to the B2B orders only. You can view the report for the current week and the previous week. The report is displayed in the form of a bar graph. In this report, you can also view the following summary details:

✦ Calendar Date
✦ Calendar Weekday
✦ Booked Value
✦ Number of Orders Confirmed
✦ Number of Order Lines Confirmed

Fulfilled Revenue By Year

The Fulfilled Revenue By Year report provides information about the fulfilled revenue for the selected year for all the shipped order lines, where the ship date is within the selected time period. The details displayed in this report pertain to B2B orders only. You can view the report for the current year and the previous year. The report is displayed in the form of a bar graph. In this report, you can also view the following summary details:

✦ Month
✦ Fulfilled Revenue
✦ Number of Orders Shipped
✦ Number of Order Lines Shipped

Booked Value By Year

The Volume Analysis Booked Value By Year report provides information about the booked value for the selected year for all the confirmed order lines, where the confirm date is within the selected time period. The details displayed in this report pertain to the B2B orders only. You can view the report for the current year and the previous year. The report is displayed in the form of a bar graph. In this report, you can also view the following summary details:

✦ Month

✦ Booked Value

✦ Number of Orders Confirmed

✦ Number of Order Lines Confirmed

Top 10 B2B Products By Revenue

The Top 10 B2B Products by Revenue report provides information about the top 10 products for the selected period and is displayed in the descending order of the revenue generated, where the ship date is within the selected period. You can view this report pertaining to the following time periods:

✦ Current Quarter

✦ Current Week

✦ Current Year

✦ Last Week

✦ Last Year

In this report, you can also view the summary details such as product code and fulfilled revenue.

Top 10 B2B Products By Quantity

The Top 10 B2B Products by Quantity report provides information about the top 10 products for the selected period and is displayed in the descending order of the quantity shipped, where the ship date is within the selected period. You can view this report pertaining to the following time periods:

✦ Current Quarter

✦ Current Week

✦ Current Year

✦ Last Week

✦ Last Year

The report is displayed in the form of a bar graph. In this report, you can also view the summary details such as product code and fulfilled quantity.

Miscellaneous Reports

In Sterling Business Intelligence, apart from the B2B and the B2C reports, you can also view the following reports also:

✦ Top Customers Reports

✦ Top Lifetime Customers

To Generate the Miscellaneous Reports

To generate the **Top Customers Report**, perform the following tasks:

1. Log in to Sterling Business Intelligence.

   The Sterling Business Intelligence home page is displayed.

2. Select **Order > Misc Reports > Top Customers Reports**.

3. From the **Time Period** drop-down list, select a value, for example, Current Year.

4. Click **Generate Report**.

   The **Top Customers Report** is displayed.

To generate the **Top Lifetime Customers Report**, perform the following tasks:

1. Log in to Sterling Business Intelligence.

   The Sterling Business Intelligence home page is displayed.

2. Select **Order > Misc Reports > Top Lifetime Customers Report**.

   The **Top Lifetime Customers Report** is displayed.

Top Lifetime Customers

The Top Lifetime Customers report provides information about the top 10 fulfilled revenues that an organization generates from their customers. The report is displayed in the descending order of the fulfilled revenue generated. You can view this report for all the customers from the period they started the business with the organization.

The report is displayed in the form of a bar graph. In this report, you can also view the summary details such as customer identifier and fulfilled revenue for all the customers of the organization.

Drill-Down and Drill-Up Reports for Top Lifetime Customers Report

From the Top Lifetime Customers metric, you can drill-down to the next level of customer hierarchy by performing a right click and selecting drill-up or drill-down on the required customer to view the corresponding report.

Top Customers Reports

The Top Customers reports provides information about the top 10 fulfilled revenues that an organization generates from their customers for the selected time period. The report is displayed in the descending order of the fulfilled revenue generated.

The report is displayed in the form of a bar graph. In this report, you can also view the summary details such as customer identifier and fulfilled revenue pertaining to all the customers of an organization.

Drill-Down and Drill-Up Reports for Top Customers Report

From the Top Customers metric, you can drill-down to the next level of customer hierarchy by performing a right click and selecting drill-up or drill-down on the required customer to view the corresponding report.

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