

## Pipeline Trending:

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PPM Services Upload Software Progress Inside Sales Attainment Solutions Performance Scorecard **Pipeline Trending** Reviews

**Pipeline Trending**

🏠 Financials ▶ Sales

🔔 Jobs to fetch data from Projector are running, numbers may show inconsistencies.

**Search Filters** Help

View By : Executive Sales Executive \* : << All SE >> Month \* : Jun-2021 Duration \* : 6

Search

Selected SE : << All SE >>

Sales Executive	PipeLine(As Of Now)				Jun-21						
	Services	Software	Services	Software	Closed	Created	Closed	Soft			
Summary	75.99 % 5,660,013 (50)	50.74 % 19,028,960 (1...)	25.49 % 72,293,139 (2...)	<25 % 33,482,021 (2...)	75.99 % 652,373 (20)	50.74 % 980,563 (27)	25.49 % 3,728,952 (1...)	<25 % 5,279,134 (2...)	5,598,041 (68)	10,974,692 (1...)	639,954 (48)
Alex Robson	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	30,000 (1)	2,000 (1)	45,656 (1)	0 (0)	0 (0)
Barry Watvyn	0 (0)	49,400 (1)	225,200 (5)	1,704,600 (11)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)
Brandon Barry	0 (0)	1,654,000 (3)	4,468,041 (19)	2,525,000 (7)	190,500 (2)	10,000 (1)	490,540 (23)	918,025 (36)	838,075 (4)	240,120 (3)	14,825 (3)
Brett Snyder	0 (0)	0 (0)	0 (0)	50,000 (1)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)
Brian Nelson Webb	328,000 (2)	165,000 (1)	332,800 (6)	1,708,800 (19)	0 (0)	137,000 (2)	22,000 (1)	392,724 (17)	0 (2)	488,000 (10)	0 (0)
Carolyn Young	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	86,341 (5)	0 (0)	0 (0)	0 (0)
Chris Medley	185,013 (6)	795,726 (14)	1,380,809 (8)	100,000 (3)	19,253 (3)	0 (0)	6,218 (1)	31,880 (4)	697,687 (6)	26,758 (2)	0 (0)
Christopher Mazerolle	0 (0)	0 (0)	0 (0)	140,000 (1)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)
Craig Bissell	0 (0)	0 (0)	1,170,000 (7)	520,000 (7)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	154,366 (1)
Damien Salazar	0 (0)	0 (0)	0 (0)	350,000 (7)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)
Darryl Zack	394,068 (3)	2,167,975 (12)	4,832,816 (19)	4,294,000 (7)	1,679 (1)	82,836 (2)	282,051 (11)	267,258 (21)	159,600 (3)	312,270 (8)	100,038 (3)
David Morrison	0 (0)	40,000 (1)	2 (2)	25,001 (2)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)

## Filters:

- **View By:** In view by filter there is two types
  - Executive: if selecting Executive then each executive's services and software's data will show.
  - CSL: if selecting CSL then, CSL field will show in that you can select one CSL or multiple CSL, each CSL's services and software's data will show.
- **Sales Executive:** In Sales Executive filter there are three types.
  - All SE: It shows combination of Active and Inactive Sales Executives.
  - Active SE: if you select Active SE, It shows Active sales executive data.
  - Select SE: In select SE, you can select multiple sales executives
- **Month and Duration:** you can select from month and selecting by duration that months services and software's data will show.

## Pipeline (As of Now):

Irrespective of selected duration, opportunities which are in Pipeline till now, that opportunities amount will be considered in Services or Software based on probability.

- **Services/Software (As of Now):**

- **75%-99% Odds:** Closing opportunities amount in between 75-99% probability based on Opportunities Closed date.
- **50%-74% Odds:** Closing opportunities amount in between 50-74% probability based on Opportunities Closed date.
- **25%-49% Odds:** Closing opportunities amount in between 25-49% probability based on Opportunities Closed date.
- **<25% + Odds:** Closing opportunities amount less than 25% probability (excluding 0%) based on Opportunities Closed date.

**Note:** In Services/Software (As of Now) we will not consider Closed won Opportunities.

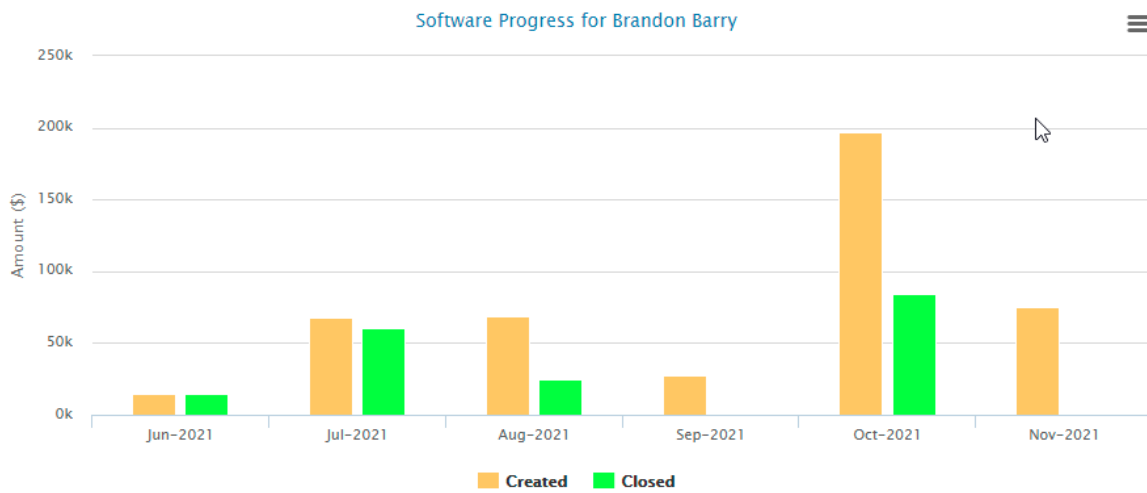
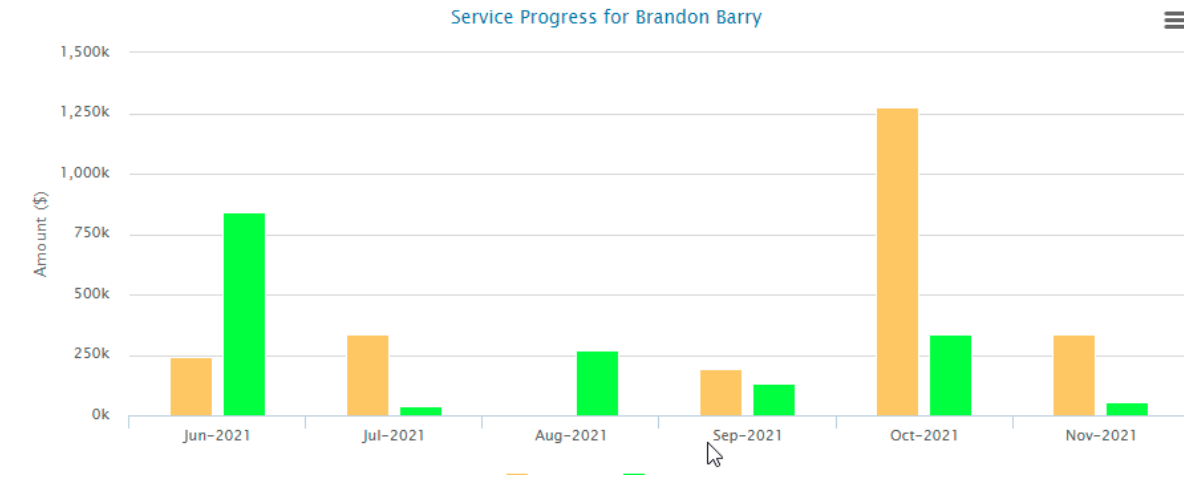
**Services/Software:**

- Closed: Closed won opportunities amount taken from Salesforce based on Opportunities closed date between the selected duration.
- Created: Created opportunities amount taken from Salesforce based on Opportunities Created date between the selected duration.

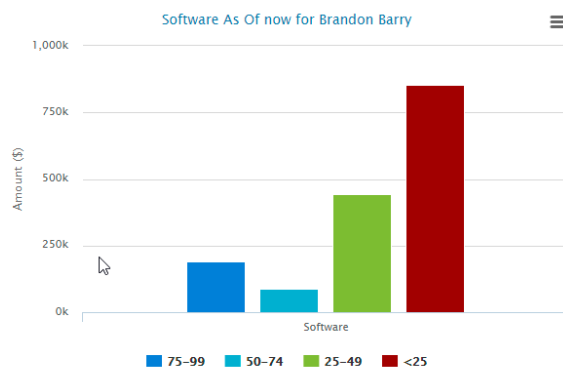
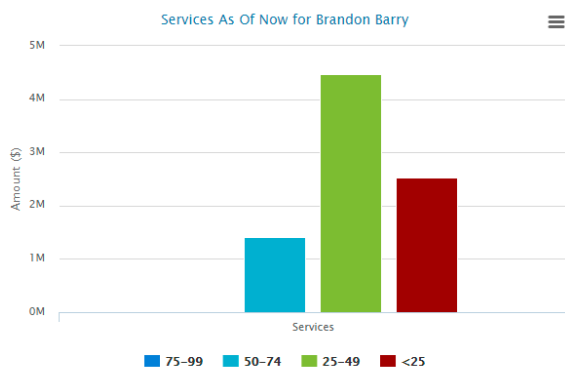
**Note:** Stages we are considering

- Closing
- Closed Won
- Conditional Agreement
- Draft proposal delivered
- Sow proposal delivered
- Qualified
- Validated

**Sales Executive Summary:** when you click on sales executive below table will shows the various graphical reports for services and software progress of sales executives.



- Services and software As of Now for Sales Executive:



**Services/Software Closed and Created:** when you click on the numbers in closed and created columns table will open below table

Progress of **Summary** for Jun-2021

**Services Closed**

Opportunity	● Customer ● Prospect	Country	Close Date	Amount (\$)	Prob %	GM %
AMC Discovery TESTING WORKSHOP	● American Multi-Cinema, Inc	US	23-Jun-21	0	100	0.00
Analytic Cloud Services SOAR Extension 2	● Analytics Cloud Services - Proj...	US	18-Jun-21	187,200	100	0.00
Astellas WO #16 MDM Support	● Astellas Pharma US, Inc	US	29-Jun-21	182,880	100	0.00
Bank Leumi - changes to the website SoW-BL-001 C...	● Bank Leumi UK	UK	25-Jun-21	13,900	100	0.00
Bluechip - 025 - ILMT Consultancy - Additional 4 days	● Bluechip	UK	30-Jun-21	5,000	100	0.00
Bluechip - TCS - TWS Upgrade Assistance	● Bluechip	UK	11-Jun-21	16,660	100	0.00
Bluechip 024 - Zurich Apache TomCat Managed Ser...	● Bluechip	UK	02-Jun-21	45,656	100	0.00
CBTS: Process Architect -John Falkl - Gilbert Abnoos	● Cincinnati Bell Technology Solu...	US	10-Jun-21	104,160	100	0.00
CBTS: Integration Architect - Karen Martinez	● Cincinnati Bell Technology Solu...	US	30-Jun-21	214,200	100	0.00
Clipper - Browns Phase 2 D365 SoW-CLP-007	● Clipper	NM	30-Jun-21	212,000	100	0.00

- In above table will show opportunity, opportunity type and opportunity belongs to which customer and their country and opportunities closed date, Amount and Probability %.